

SPF SIG INSTRUMENTS

Grant Management Reporting Tool



Prevention Management
Reporting and Training System

USER MANUAL

VERSION 1.1

APRIL 2012

Ph: 888.348.4248	KIT Solutions®, LLC 5700 Corporate Dr Suite 530 Pittsburgh, PA 15237
Fax: 412.366.7199	
DITICSupport@kitsolutions.net	

TABLE OF CONTENTS

Introduction	4
Tips for Using the System Effectively	5
Recommended Computer Settings	5
Application Navigating	6
Menu Information	7
Landing Pages	9
Listing Pages	10
Edit Forms	12
Data Fields and Buttons	13
Edit Form Buttons	14
Additional Feature Buttons	15
Calendar Feature	15
Training Videos	16
Login Procedure	17
Change Your Password	20
Forgot Your Password?	21
Account Locked	23
Current Organization	24
Grant Selection	25
Implementation	26
Sub-Recipient	27
Adding a Sub-Recipient	27
Editing a Sub-Recipient	30
Deleting a Sub-Recipient	30
Evaluation	31
Grantee Level Instrument (GLI) Infrastructure Survey	32
Entering the GLI Infrastructure Survey	32
Grantee Level Instrument (GLI) Implementation Survey	33
Enter the GLI Implementation Survey	33
CLI Part I-Administrative Survey	34
Entering the CLI Part I-Administrative Survey	34
CLI Part I-Sub-recipient Initialization	36
Adding a Sub-recipient Initialization Contact	36

Editing a Sub-recipient Initialization Contact.....	38
CLI Part I	39
Entering a CLI Part I Survey.....	39
Q163: Manage Implemented Interventions.....	41
Q163: Manage Implemented Interventions – Strategies.....	44
CLI Part I Submission	47
CLI Part II.....	49
Entering a Sub-Form Survey	49
Entering a Demographic Survey.....	51
CLI Part II Submission.....	53
View/Accept CLI Part – I.....	55
Viewing a Submitted CLI Part I.....	55
Accepting a Submitted CLI Part I.....	56
View/Accept CLI Part – II.....	58
Viewing a Submitted CLI Part II Sub-form Survey	58
Viewing a Submitted CLI Part II Demographic Survey.....	59
Accepting a Submitted CLI Part II.....	60
Participant Level Instrument (PLI).....	62
Identify Instrument.....	62
Editing an Instrument.....	65
Deleting an Instrument.....	66
Identify Participant.....	67
Editing a Participant.....	68
Deleting a Participant	69
Enter My PLI Data	70
Upload My PLI Data	72
Create PLI User Accounts	75
Adding a PLI User Account.....	75
Editing a PLI User Account.....	77
Administration	78
SPF-SIG Instruments Data Export.....	79
Using the Data Export	79
SPF-SIG Instruments Reports	80
Viewing a Report	80

INTRODUCTION

What is the purpose of the SPF SIG MRT system?

The SPF SIG MRT system is a web-based system designed to help your organization or help you use SAMHSA's Strategic Prevention Framework (SPF). Each SPF step (Assessment, Capacity, Planning, Implementation, and Evaluation) is displayed as a link (or button) at the top of the page. Required Progress Reports will be submitted through SPF SIG MRT. You will work through each of these SPF steps to populate your quarterly Progress Report. In addition to submitting reports, you will be able to use SPF SIG MRT as a way to manage your grant.

TIPS FOR USING THE SYSTEM EFFECTIVELY

Recommended Computer Settings

Screen Resolution

You will get the best screen layout if you set your PC monitor settings to 1024 X 768 pixels or larger. If your screen resolution is smaller (800 X 600 pixels) everything on the screen will appear larger. If you use 800 X 600 pixels, you will have to scroll more both up and down and left and right to access all the data fields.

To change your PC monitor settings, right click on the Desktop background and select Properties. Next, click on the Settings tab and move the Screen Resolution scroll bar to the right (towards 'more') to select 1024 X 768 resolution. Click the OK button at the bottom of the window to make the change effective.

Web Browser

The web browser supported by SPF SIG MRT is Microsoft Internet Explorer (IE). Mozilla Firefox, Netscape, Safari and other browsers may not be supported by SPF SIG MRT. They may function but not to design specifications. We recommended users have the latest version of IE installed on their computer along with the updates provided by Microsoft (which are released periodically).


Pop-Up Blocker

Modern computer security technology and usability features development have lead to pop-up blocking. Although this new feature of internet browsers, toolbars, and other 3rd party managing software blocks hazardous and annoying pop-up, sites likes SPF SIG MRT require pop-ups to be able to function. If your pop-up blocker is enabled, there is a possibility that SPF SIG MRT may not function or appear properly. You should either disable the pop-up blocker while using SPF SIG MRT (while remembering to enable it, if desired, when not in SPF SIG MRT) or create exceptions for the pop-up blocker. This is cumbersome but may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your Internet Explorer browser window. Once the browser is open click the toolbar options "Tools" and then go to "Internet Options". After the "Internet Options" window is available you will want to click on the "Privacy" tab at the top of the window. You will notice while on the "Privacy" tab, at the bottom will be a section on Pop-Up Blockers. If your "Block Pop-Ups" checkbox is checked, click on the "Settings" button. You can now add the SPF SIG MRT link to the "Allowed Sites" list which the pop-up blocker will ignore when trying to block pop-ups from SPF SIG MRT.






***Notes:** These are instructions for Internet Explorer 7.0 and may be different for other Internet Explorer versions.

Application Navigating

SPF SIG MRT is set up in such a fashion that moving from top to bottom of each page and section to section on the Menu is the best approach to using the system. You must start at Assessment, filling in all of the information for that module (all pages and submenus), before moving on to Capacity and the other Menu items. Continuing in this manner will ensure that all of the forms in the systems have enough information to function correctly. If certain forms have not been completed you may have difficulty completing other forms. You also must save each form before moving onto the next form by clicking the  (Save) button located at the bottom of the form.

Computer Keys

While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

Key	Description	Function
	Mouse cursor	Points to desired location
	TAB key	Moves the cursor to the next data field
	SHIFT key + TAB key	Moves the cursor to the previous data field
	Control (CTRL) key	Enables blocked material to open (due to pop-up blocker)
	MOUSE	Moves the cursor by pointing and clicking

Entering data into SPF SIG MRT can be made easier by using the “TAB” key on the keyboard. The “TAB” key advances the cursor to the next data field. You can go from the current field to the previous field by holding “SHIFT” and pressing “TAB” (SHIFT + TAB). You can also navigate through the fields by using the mouse.

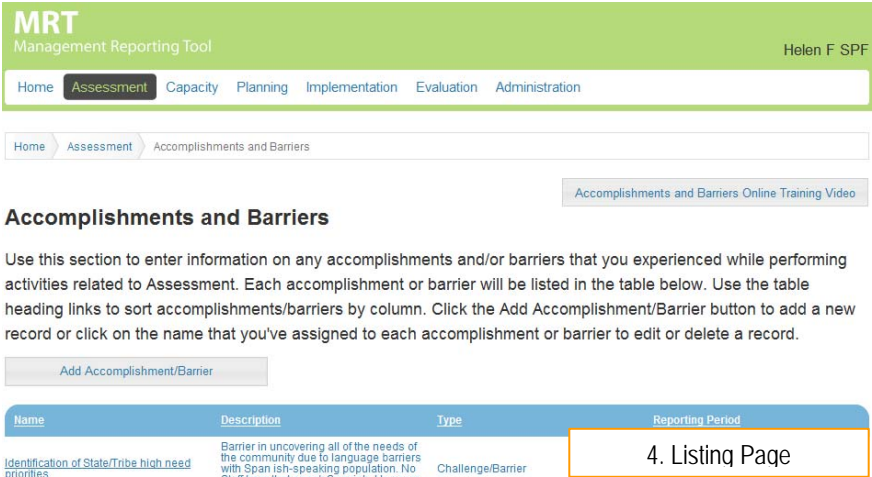
Menu Information

You can access the six (6) main areas by using the Menu or the links from the Home page. The Menu for SPF SIG MRT is located near the top of the screen. The Menu includes links to the six (6) main areas of SPF SIG MRT. Clicking on a link brings you to the corresponding page (called a Landing Page) which displays the submenu modules for that area as links to access the module. Once a module is selected from a Landing Page, the module's Listing Page will be available to add new data or modify existing data. (For more information on Landing Pages and Listing Pages, see the [Landing Pages](#) and [Listing Pages](#) sections of this manual.)

- 1. Menu Constant (unchanging). Available at all times.
- 2. Submenu Category Varies depending on which Menu link is selected.
- 3. Landing Page Varies depending on which Menu link is selected. Displays the Submenu.
- 4. Listing Page Varies depending on which Submenu category link is selected.

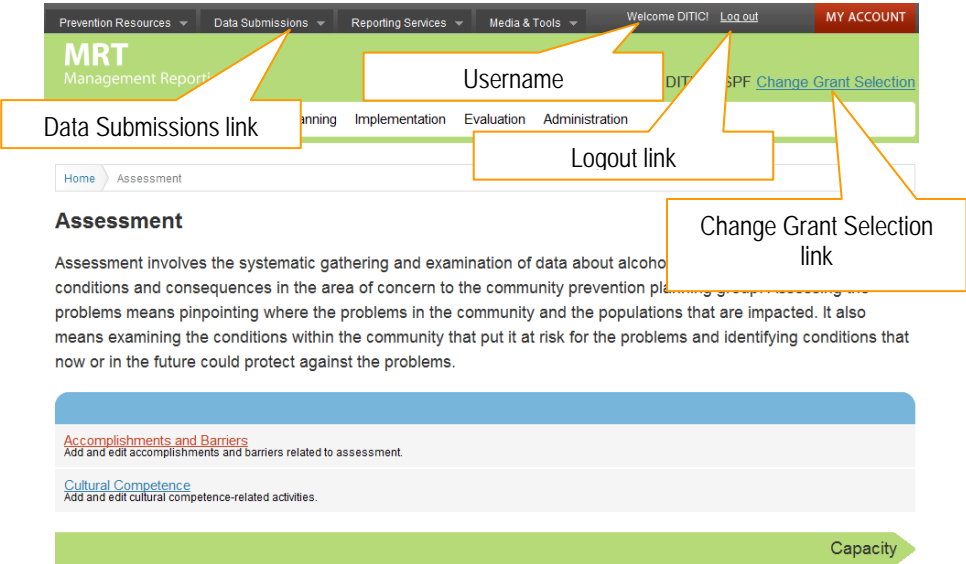


Screenshot displaying the Menu and a Landing Page



Sample screenshot displaying a Listing Page

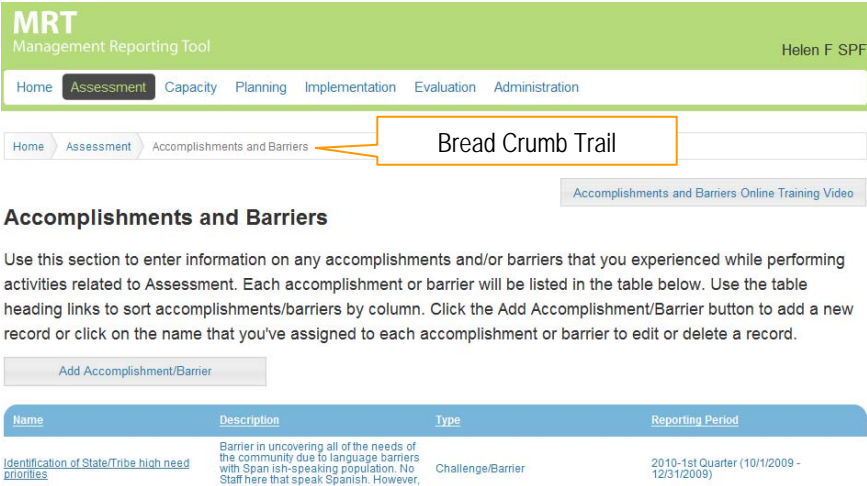
Above the Menu provides links to Logout of the system or to Change Grant Selection. The Grant is listed as well as the user currently logged into MRT SPF SIG.



Screenshot displaying main menu

Bread Crumb Trail

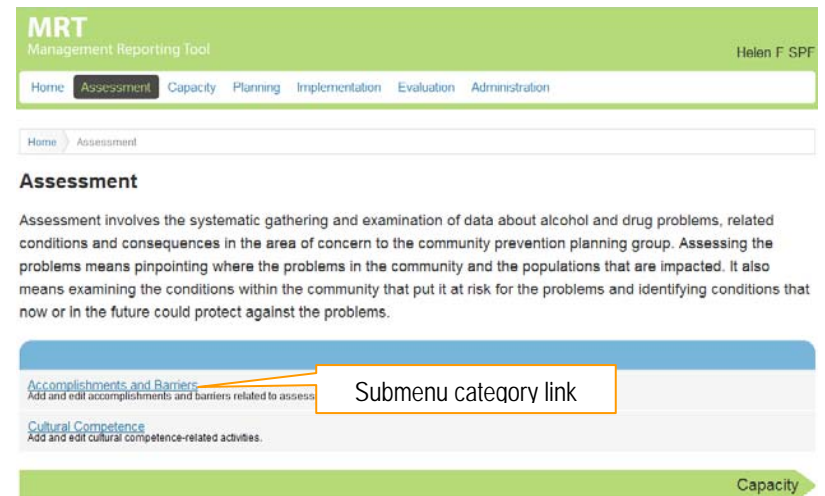
A Bread Crumb Trail is provided to indicate where you currently are in the system. The links provided in the Bread Crumb Trail allow you to go to the previous page you were on.



Sample screenshot displaying a Bread Crumb Trail

Landing Pages

A Landing Page is the main page of each of the main sections, or modules (Assessment, Capacity, Planning, Implementation, Evaluation, and Administration) within SPF SIG MRT. The Landing Page contains the links for each module (Submenu category) within the section. No data is entered on a Landing Page.



Screenshot displaying a Landing Page

Listing Pages

A Listing Page is the main page of each module (Submenu category) within the main sections of SPF SIG MRT. A Listing Page contains either all data that have been entered for the module or a portion of the data that has been entered with links to view/edit the previously recorded data in its entirety. No data is entered on a Listing Page.

There are three types of Listing Pages:

- 1. **Grid View**
- 2. **Hierarchy View**
- 3. **Single Form View**

Grid View:

The Grid View displays the data in tables. Multiple data is entered and saved when a Grid View Listing Page is available. Specific pieces of data will be displayed within the grid based on the fields within the Edit Form (see the [Edit Forms](#) section of this manual for details on the Edit Form).

- An [Add](#) (**Add**) or [Create](#) (**Create**) button will be available above the grid to create multiple data entries (records).
- Clicking on a field name link located to the left within the grid will allow you to view/edit the data.

MRT

Management Reporting Tool

Helen F SPF

[Home](#) [Assessment](#) [Capacity](#) [Planning](#) [Implementation](#) [Evaluation](#) [Administration](#)

[Home](#) [Assessment](#) [Accomplishments and Barriers](#)

[Accomplishments and Barriers Online Training Video](#)

Accomplishments and Barriers

Use this section to enter and/or barriers that you experienced while performing activities related to the barrier will be listed in the table below. Use the table heading links to sort accomplishments/barriers by column. Click the Add Accomplishment/Barrier button to add a new record or click on the name that you've assigned to each accomplishment or barrier to view/edit the data.

[Add Accomplishment/Barrier](#)

Name	Description	Type	Reporting Period
Identification of State/Tribe high need priorities	Barrier in uncovering all of the needs of the community		2010-1st Quarter (10/1/2009 - 12/31/2009)

Sample screenshot displaying a "Grid View" Listing Page

Tips

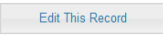
- Clicking on a field name in a Category field (e.g., [Name](#)) will allow you to sort through your data in ascending or descending order.
- If you are entering data for the first time, the grid will appear empty.

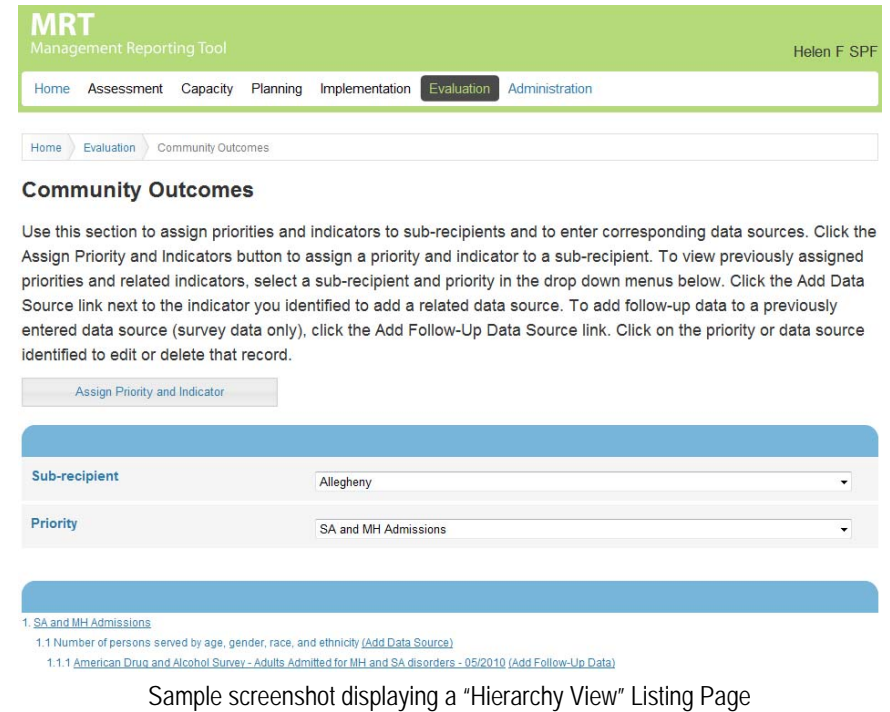
Hierarchy View:

A Hierarchical View is used when there is a 'Parent/Child' relationship. Looking at the example, it shows the parent (the Priority) and the child (the Indicator). The need to link a child (Indicator) to a parent (Priority) adds complexity to the process of adding and searching. The hierarchical view was designed to simplify these tasks.

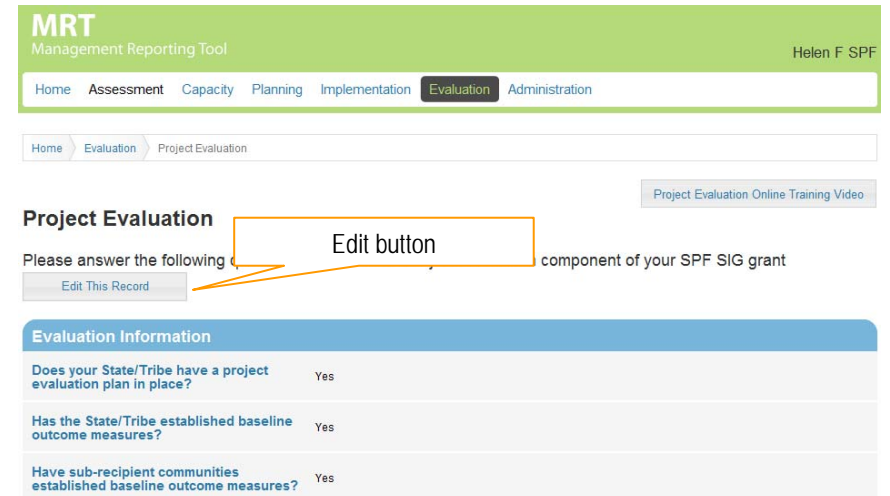
Single Form View:

The Single Form View is used when the data entered is updated periodically. Only one (1) form is available and edited. The Single Form View displays the data fields on the Edit Form (see the [Edit Forms](#) section of this manual for details on the Edit Form).

- An  (Edit) button will be available to modify the data.





Sample screenshot displaying a "Hierarchy View" Listing Page

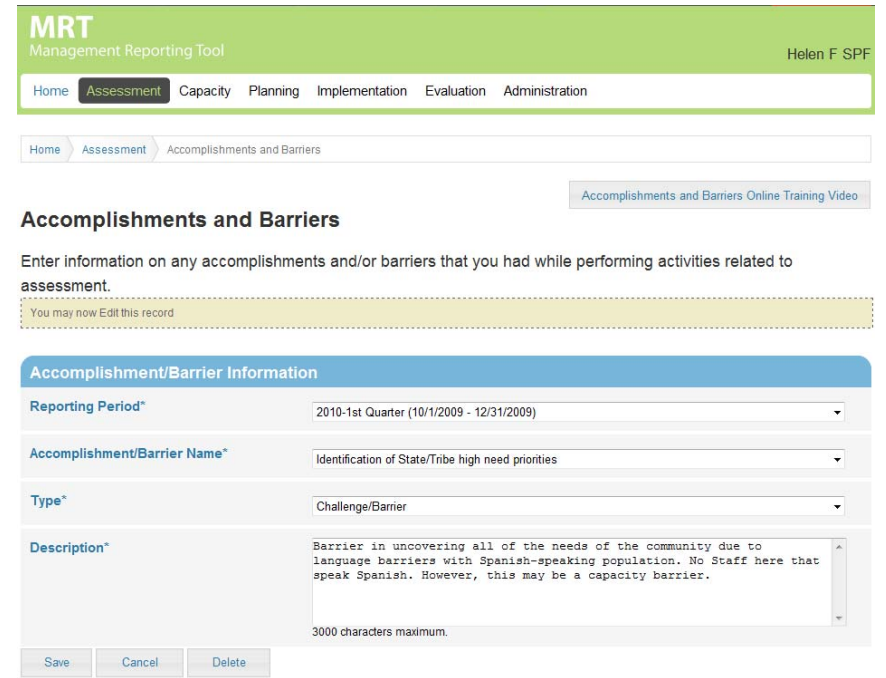


Sample screenshot displaying a "Single Form View" Listing Page

Edit Forms

The Edit Form contains the fields for entering and editing data.

- If you clicked the  **(Add)** or  **(Create)** button to enter new information into a form, the Edit Form data fields will be blank.
- When selecting a field name link to view existing data, the Edit Form data fields will display the data that was entered/selected previously. These fields may be modified, if needed.



The screenshot displays the MRT Management Reporting Tool interface. At the top, the header includes the MRT logo, the title 'Management Reporting Tool', and the user name 'Helen F SPF'. Below the header is a navigation bar with links: Home, Assessment (selected), Capacity, Planning, Implementation, Evaluation, and Administration. A secondary navigation bar shows the path: Home > Assessment > Accomplishments and Barriers. A link for 'Accomplishments and Barriers Online Training Video' is also present. The main section is titled 'Accomplishments and Barriers' and contains the instruction: 'Enter information on any accomplishments and/or barriers that you had while performing activities related to assessment.' Below this is a yellow box stating 'You may now Edit this record'. The form itself is titled 'Accomplishment/Barrier Information' and contains several fields: 'Reporting Period*' (dropdown menu showing '2010-1st Quarter (10/1/2009 - 12/31/2009)'), 'Accomplishment/Barrier Name*' (dropdown menu showing 'Identification of State/Tribe high need priorities'), 'Type*' (dropdown menu showing 'Challenge/Barrier'), and 'Description*' (text area containing the text 'Barrier in uncovering all of the needs of the community due to language barriers with Spanish-speaking population. No Staff here that speak Spanish. However, this may be a capacity barrier.' and a note '3000 characters maximum.'). At the bottom of the form are three buttons: 'Save', 'Cancel', and 'Delete'.

Sample screenshot displaying an Edit Form for existing data

Data Fields and Buttons

In SPF SIG MRT there are several fields, boxes, and buttons that are used to collect, store, and organize data.

Here are some examples:

Type	Preview/Description
Text Field (aka text box)	<input type="text"/>
Drop Down List (aka dropdown menu)	<div>Select One ▼</div>
Radio Buttons	<input checked="" type="radio"/> selected <input type="radio"/> not selected
Check Boxes	<input checked="" type="checkbox"/> checked <input type="checkbox"/> unchecked
Required Fields	<div>Date Established*<input type="text"/></div> (mm/dd/yyyy)
Calendar	(See the Calendar Feature section for instructions.)

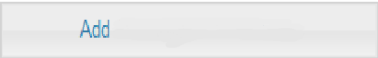

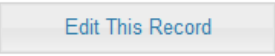
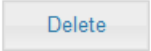

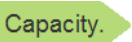
If a required field does not have data entered into it and you try to save the form you will receive a message that informs you of the field vacant of data and you will not be able to save that form until that field has data. Some or all of the fields may be required in order to save a form. Those fields that are required are **bold** and marked with an asterisk (*).

Tips

- You must click the (**Save**) button before moving on to the next section in the system.
- To select multiple data options at one time from a list box, hold the control (CTRL) key on your keyboard while simultaneously left clicking the mouse on any of the data options that you'd like to include in your entry.

Edit Form Buttons

Information is entered and edited through the Edit Form. The table below summarizes the buttons used to enter and edit data into an Edit Form.

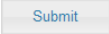

Button	Description
	Must be selected to add new information to an Edit Form
	
	Allows the Edit Form fields to be “open” for modification
	Removes the information (data) from the SPF SIG MRT database
	Adds the information (data) to the SPF SIG MRT database
	Cancels the Add or Edit without saving the information (data) entered

Additional Feature Buttons

Within the MRT Application are icons offering additional help to the user. Click on one of the icons to receive the help needed.

	Provides information on the desired topic
---	---





Below are some additional buttons that may appear within a form:



	Forwards the approved information to the appropriate parties for further consideration.
	Downloads the selected file into the desired format.

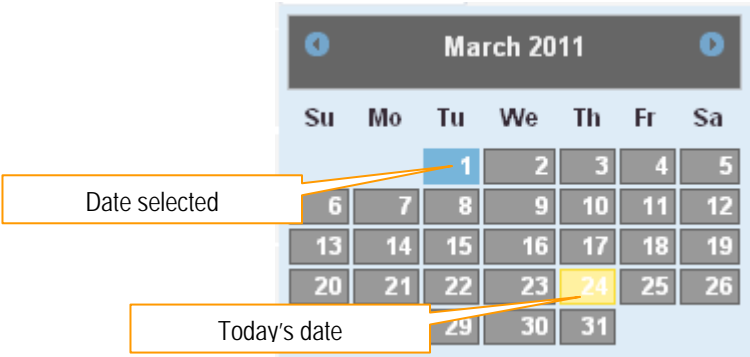
Calendar Feature

Dates can be entered in two different ways: 1) typing the date directly into the field or 2) using the **Calendar** feature. The **Calendar** can be used as an alternative option to entering a date directly into a date field.

- 1. When you select a date field, a calendar displaying the current month and year will display below the date field.
- 2. Select the date by clicking on a number within the calendar.
- 3. The calendar will close and the date will appear within the date field.

***Note:** You can also change the month by clicking the   arrows to the right and left of the Month/Year. Clicking the  arrow will take you to the previous month whereas clicking the  arrow will take you to the next month.

For instance, the current month displaying is March. Clicking the  arrow will take you to February whereas clicking the  arrow will take you to April.



Training Videos

The MRT system has training videos available to watch in addition to using this manual. These videos are broken down into the different sections of the system, and many sections have access to its respective training video. Follow the instructions below to view a training video.

- 1. To view the training video of the section you are currently in, click the **(Online Training Video)** button.
- 2. The video will open in a new window.
- 3. To close the training video window, click the **X** on the top-right corner of your screen.

MRT
Management Reporting Tool

Helen F SPF

Home Assessment Capacity **Planning** Implementation Evaluation Administration

Home Planning Accomplishments and Barriers

Online Training Video button

Accomplishments and Barriers Online Training Video

Accomplish

Use this section to enter information on any accomplishments and/or barriers that you experienced while performing activities related to planning. Each accomplishment or barrier will be listed in the table below. Use the table heading links to sort accomplishments/barriers by column. Click the Add Accomplishment/Barrier button to add a new record or click on the name that you've assigned to each accomplishment or barrier to edit or delete a record.

Add Accomplishment/Barrier

Name	Description	Type	Reporting Period
Establishment of key policies	Although 5 of the 6 distinct communities were represented at the Planning meeting, our most at risk community (the Native American Community) was not in attendance.	Challenge/Barrier	2010-1st Quarter (10/1/2009 - 12/31/2009)

Sample screenshot displaying Accomplishments and Barriers listing page

LOGIN PROCEDURE

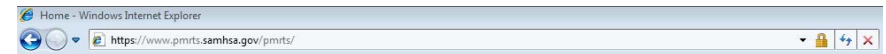
Connect to the Internet using an internet browser (e.g., Internet Explorer).

In the Address (location) box, type in the following address and press Enter:

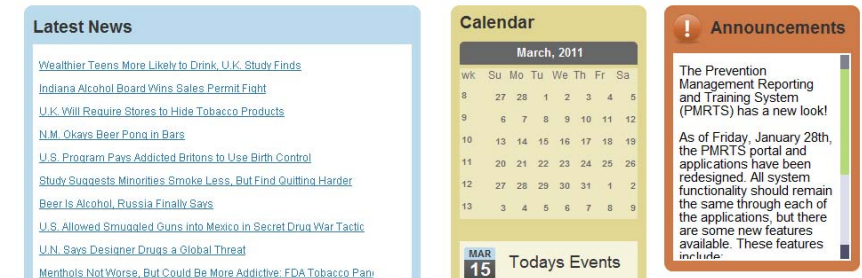
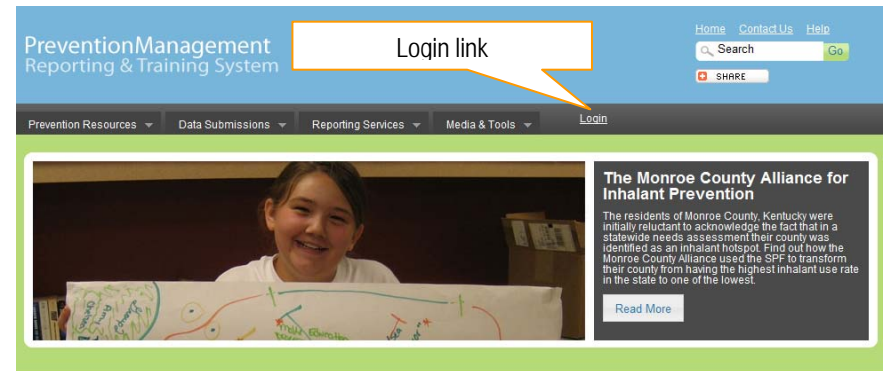
<https://www.pmrts.samhsa.gov/pmrts/>

To access SPF SIG MRT, you will login through the Prevention Management Reporting and Training System website.



1. Click the **Login** (Login) link located at the top right hand corner of the screen.



Screenshot displaying the URL in Internet Explorer – this is a partial screenshot



Screenshot displaying the PMRTS Home Page – this is a partial screenshot

2. Type the login name in the **User Name*** field.
 3. Type the password in the **Password*** field.
 4. Click the box that states "**I agree to these Terms and Conditions**".
 5. Click the  (**Log In**) button.
- *Note: To cancel the login process, click the  (**Cancel**) button.

Login

You must login to access secure content

Username:

Password:

* You must accept the terms and conditions in order to login and access secure content.

All users of the Prevention Management Reporting and Training System Web site are expected to adhere to the security standards of the Reporting and Training System to the fullest, in accordance with other users and in handling substance information that Prevention Management Reporting and Training System provides. The Prevention Management Reporting and Training System issues each user a unique user ID and a system-generated password. As a user, you are required to change the system-

☐ I agree to these Terms and Conditions

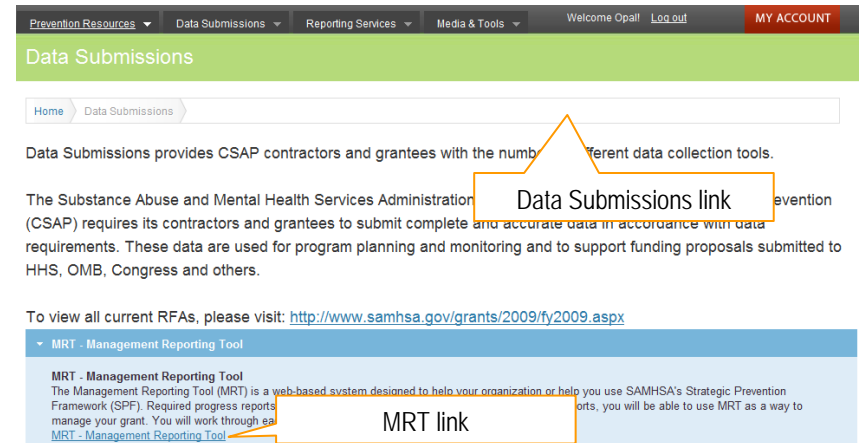
? [Forgot your Password?](#)

Screenshot displaying the Login page

Tips

- The **User Name** is NOT case sensitive.
- The **Password** IS case sensitive.

6. Click **Data Submissions** (Data Submissions) from the Prevention Management Menu.
7. From the Your available systems: box, click the [MRT - Management Reporting Tool](#) (MRT – Management Reporting Tool) link.



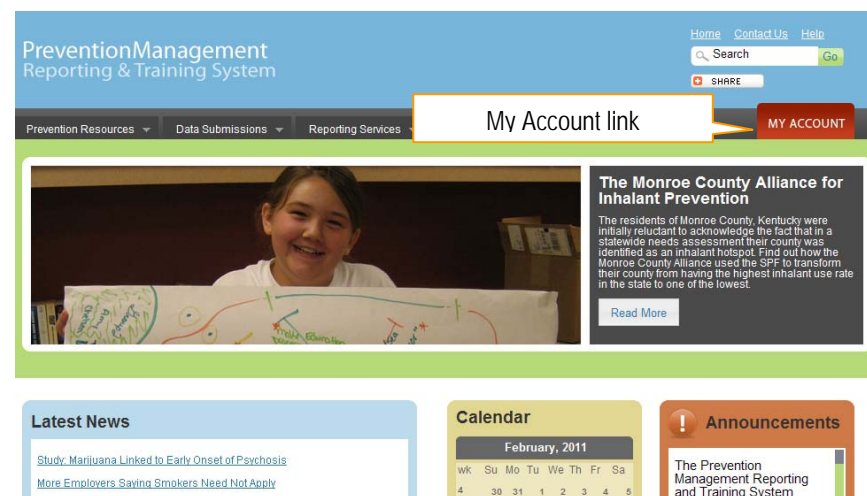
Screenshot displaying the Prevention Management Data Submissions Landing Page

Change Your Password

The Change Your Password feature allows a user to change the password for the account he or she is currently logging into the system with.

1. To change your password, begin by clicking the **MY ACCOUNT** (My Account) button from the Prevention Management Reporting and Training System main menu.
2. Click the [Change Your Password](#) (Change Your Password) link..

3. Select a **Security Question*** from the dropdown list.
*Note: The Security Question will be used when using the Forgot Password feature to ensure the user requesting a password is legitimate.
4. Enter your answer to the selected security question in the **Security Answer*** field.
5. Type the password you would like to use in the **New Password*** field.
6. Retype the password in the **Confirm New Password*** field.
7. Verify or update the email address in the **Email Address*** field.
8. Click the **Submit** (Submit) button.



Screenshot displaying the Home page – this is a partial screenshot

Sample screenshot displaying the Change Your Password page

Tips

- The **User Name** is NOT case sensitive.
- The **Password** IS case sensitive. The Password must fill the following requirements:
 - Minimum length: 8 characters
 - At least one (1) upper case letter
 - At least one (1) lower case letter
 - At least one (1) of the following special characters: !@#\$\$%^&
- You will be required to change your password every 90 days.

Forgot Your Password?

If you are unable to log into SPF SIG MRT due to forgetting your password, you can retrieve this information at the login page.

1. On the Login page, click the [? Forgot your Password?](#) (**Forgot your Password?**) link.

Login

You must login to access secure content

Username:

Password:

* You must accept the terms and conditions in order to login and access secure content.

All users of the Prevention Management Reporting and Training System Web site are expected to adhere to the security standards of the Prevention Management Reporting and Training System to the fullest, in respect to their interaction with other users and in handling substance abuse prevention information that Prevention Management Reporting and Training System provides. The Prevention Management Reporting and Training System issues each user a unique user ID and a system-generated password. As a user, you are required to change the system-



☐ I agree to these Terms and Conditions

Login Cancel

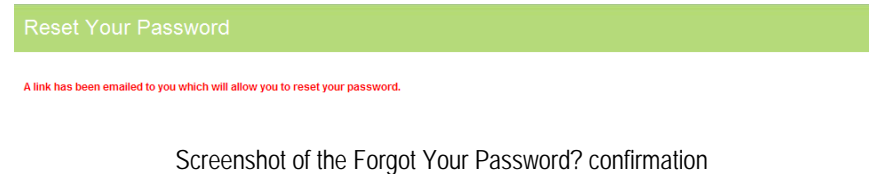
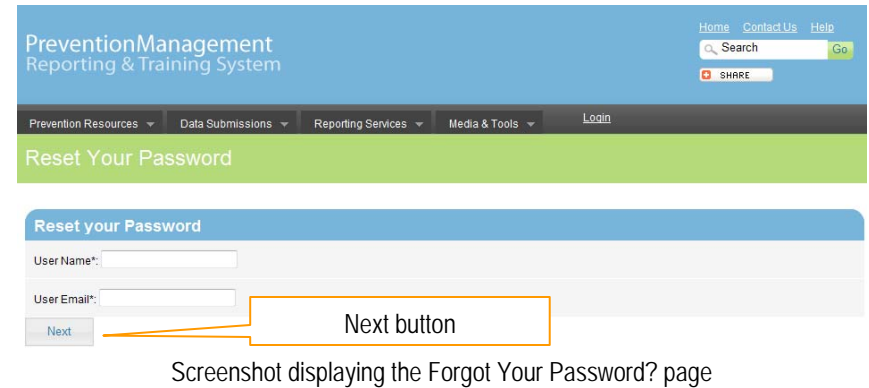
? [Forgot your Password?](#)

Forgot your Password? link

Screenshot displaying the Login page

2. Type the login name in the **User Name*** field.
3. Type the email address of the user who is associated with the User Name in the **User Email*** field.
*Note: This must be a valid email address.
4. Click the  **(Next)** button.
5. On the next screen, answer the Security Question.
6. Click the  **(Next)** button.

7. A new temporary password will be sent to the email address that is associated with the User Name.



Tips

- If you currently do not have an account you will not be able to use the Forgot Password feature.
- If you do not receive a new temporary password, first check your junk mail and spam folders. If you still did not receive a temporary password contact Support at 1-888-DITIC-4-U (348-4248). The following reasons may be the cause: your email address has changed since the account was created, you mistyped the email address, or you are unable to receive emails from Support.
- Please add the following domain to your email safe list: @kitsolutions.net to ensure you receive emails from Support.

Account Locked

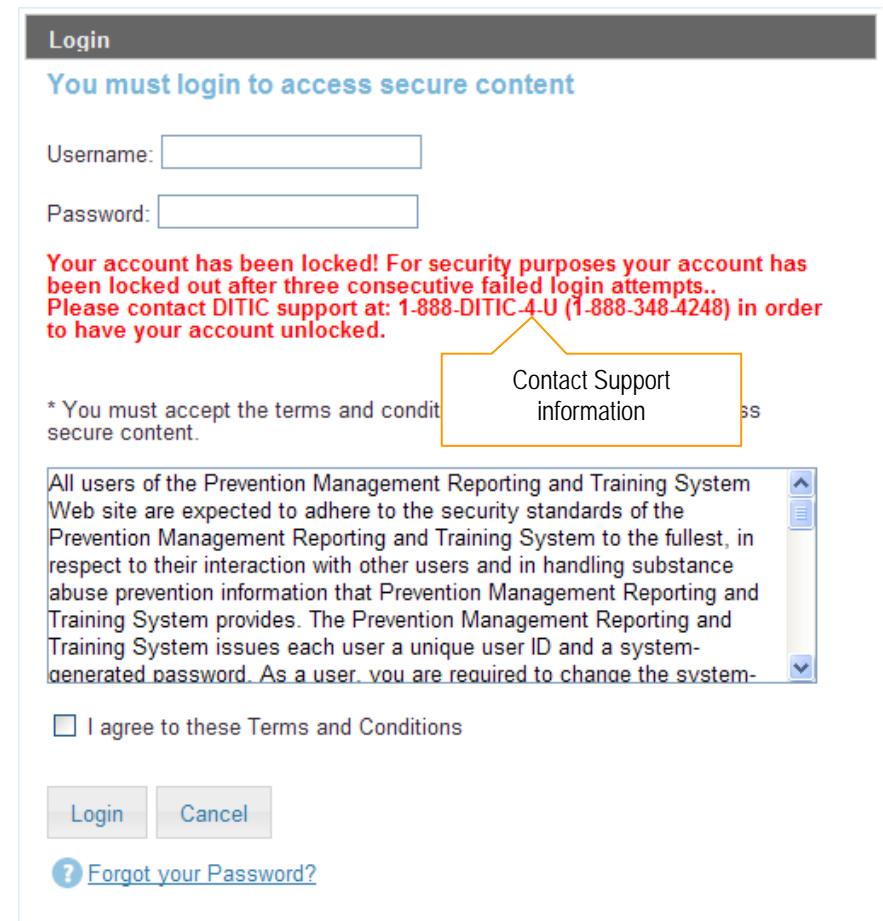
If you attempt to log into the system unsuccessfully three (3) times, you will be locked out of your account. Please contact Support to have your account unlocked.

SUPPORT CONTACT INFORMATION:

- 1-888-DITIC-4-U (348-4248)
- DITICSupport@kitsolutions.net
- Use the Contact Form on the Support Site:
<http://kitusers.kithost.net/support/diticsupport>

Once your account is unlocked you will receive an email:

- 1) The email informs you that your account has been unlocked.
Subject line will read: **User Account has Been Unlocked**



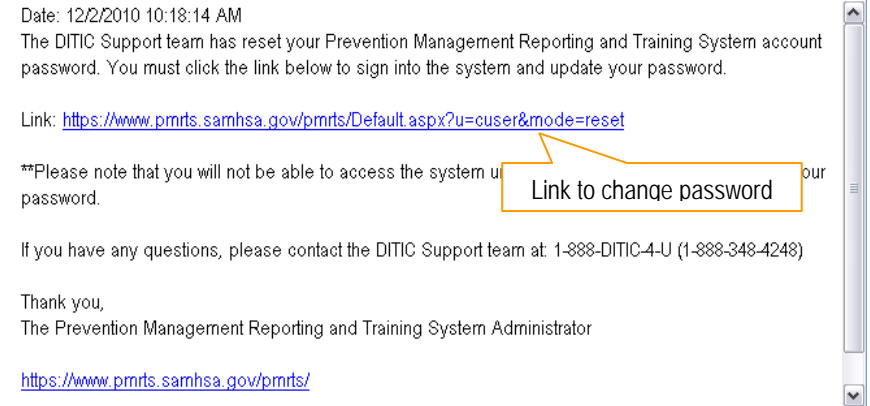
The screenshot shows a web page titled "Login" with a dark header. Below the header, a blue banner reads "You must login to access secure content". There are two input fields: "Username:" and "Password:". Below these fields, a red message states: "Your account has been locked! For security purposes your account has been locked out after three consecutive failed login attempts.. Please contact DITIC support at: 1-888-DITIC-4-U (1-888-348-4248) in order to have your account unlocked." An orange callout box points to this message with the text "Contact Support information". Below the red message, there is a line of text: "* You must accept the terms and conditions to access secure content." followed by a checkbox labeled "I agree to these Terms and Conditions". At the bottom, there are two buttons: "Login" and "Cancel". Below the buttons is a link: "? Forgot your Password?". A scrollable text box contains the following text: "All users of the Prevention Management Reporting and Training System Web site are expected to adhere to the security standards of the Prevention Management Reporting and Training System to the fullest, in respect to their interaction with other users and in handling substance abuse prevention information that Prevention Management Reporting and Training System provides. The Prevention Management Reporting and Training System issues each user a unique user ID and a system-generated password. As a user, you are required to change the system-

Screenshot displaying the Account Locked screen

When your account is unlocked you can request Support to reset your password if you do not remember your current password.

Once your password has been reset you will receive an email:


- 1) The email provides you a link to reset your password.
Subject line will read: **Password Has Been Reset**

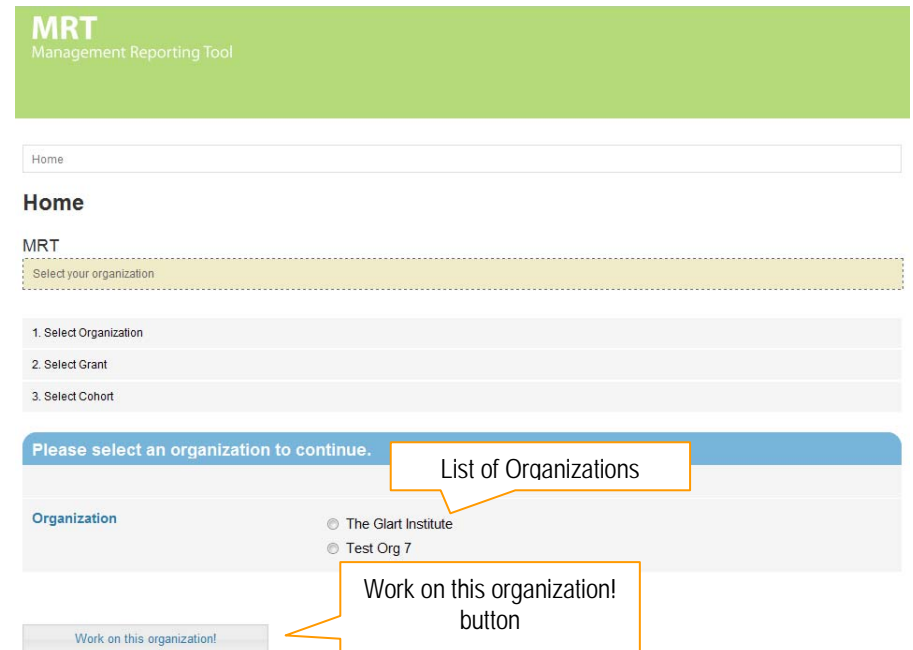


Screenshot of the Password Reset email – this is a partial screenshot

Current Organization

If you work in multiple organizations, you will have to select the organization from the list of Organizations. *This screen will not appear if you work at one (1) organization.*


1. Select the radio button next to the appropriate organization name.
2. Click the  (Work on this organization!) button.

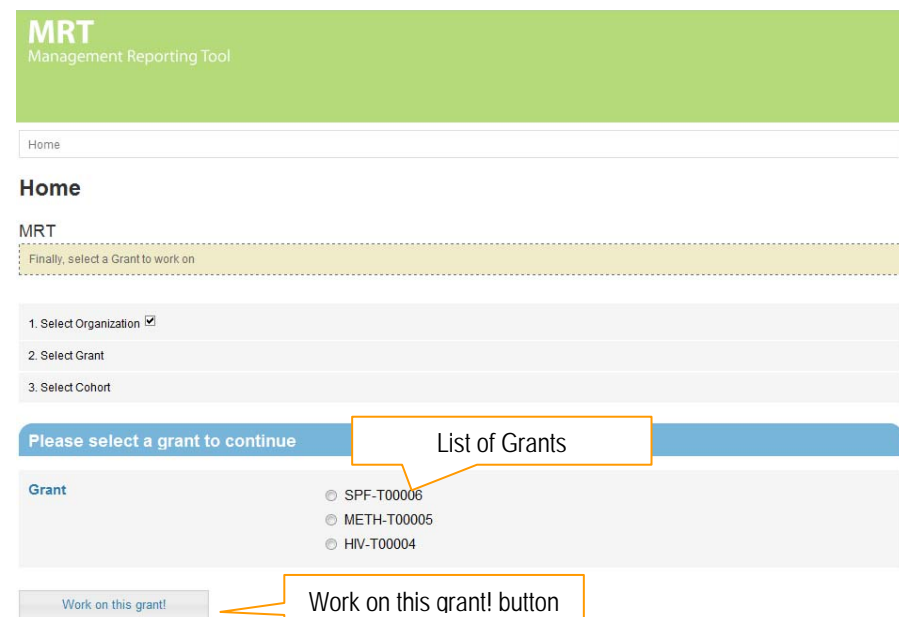


Screenshot displaying the Organization selection page

Grant Selection

If your organization works with multiple Grants, you will have to select the Grant name from the list of Grants. *This screen will not appear if you work on one (1) Grant.*

1. Select the radio button next to the appropriate Grant.
2. Click the  (**Work on this grant!**) button.



MRT
Management Reporting Tool

Home

Home

MRT

Finally, select a Grant to work on

1. Select Organization ☒

2. Select Grant

3. Select Cohort

Please select a grant to continue

Grant

- ☐ SPF-T00006
- ☐ METH-T00005
- ☐ HIV-T00004

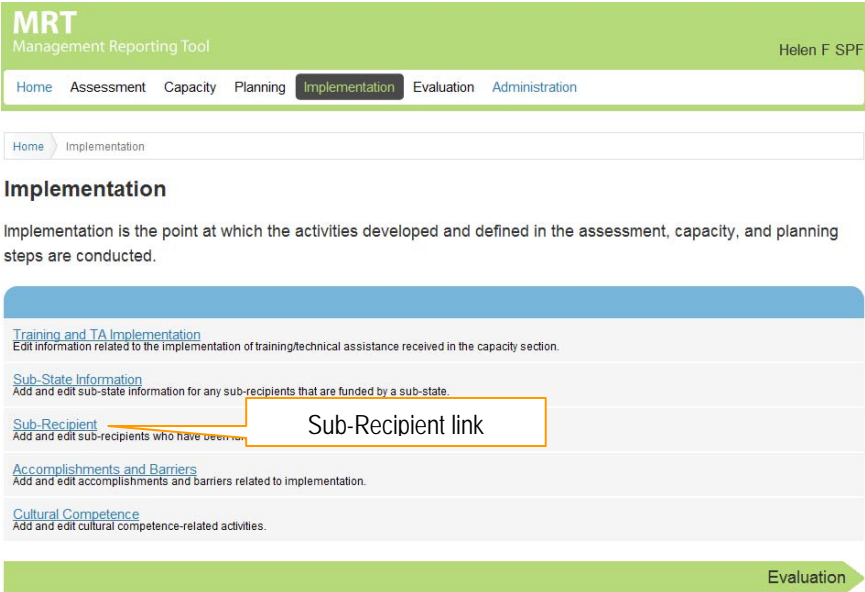
Work on this grant!

Screenshot displaying the Grant selection page

IMPLEMENTATION

Within the Implementation module, a user is able to perform the following tasks:

- 1. Enter, edit and delete Sub-Recipient.




Screenshot displaying the Implementation Landing Page

Sub-Recipient

The Sub-Recipient module allows the user to add Sub- Recipients that are funded.

Adding a Sub-Recipient

- 1. Click **Implementation** from the Menu.
- 2. Click **Sub-Recipient** from the Implementation Landing Page.
- 3. Click the  (Add Sub-Recipient) button.

MRT
Management Reporting Tool

Helen F SPF

Home Assessment Capacity Planning Implementation Evaluation Administration

Home Implementation Sub-Recipient

Sub-Recipient Online Training Video

Sub-Recipient

Use this section to enter any sub-recipients who have been funded. Each sub-recipient will be listed in the table below. Use the table heading links to sort sub-recipients by column. Click the Add Sub-recipient button to add a new sub-recipient or click on the s each sub-recipient to edit or delete a record.

Add Sub-recipient

Add Sub-recipient button


Sub-recipient Name	Organization Name	Community/Coalition Name	Amount Awarded per Year	Date Funded
Allegheny		Allegheny County	7000.00	6/24/2010
Allegheny ACTION		Pittsburgh Urban Area	32000.00	12/1/2010
Allegheny County	Allegheny County	Allegheny County	15000.00	1/5/2010
Allegheny Youth Advancement Program		North Side of the City	75000.00	12/1/2009
Allegheny Youth Advocacy	Allegheny Youth Advocacy	Allegheny County At-Risk Youth	15000.00	1/21/2010
Cabell County	Cabell County Dept of HHS	Cabell County	56000.00	5/19/2010
Clearfield Substance Abuse Counseling Center		Clearfield Twp	0	
Hanshaw County		Hanshaw County	15000.00	10/10/2009
Hope & Recovery Coalition		Hope & Recovery Coalition	80000.00	7/1/2009
Mount Washington Community	Mt. Washington CDC	Mount Washington Township	10000.00	12/12/2009
No Drugs Coalition		No Drugs Coalition	100000.00	7/1/2009
River Valley Initiative		Rural Townships of the River Valley	5000.00	12/3/2009
South End Healthy Coalition		South End Healthy Coalition	80000.00	7/1/2009
Substance Abuse Coalition		Substance Abuse Coalition	80000.00	7/1/2009


Sample screenshot displaying the Sub-Recipient Listing Page

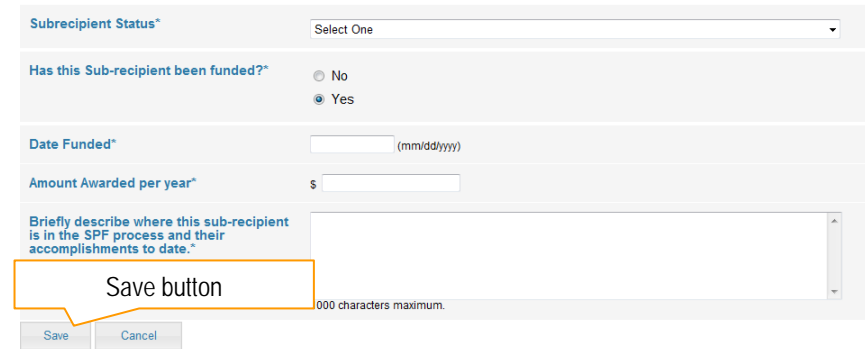
4. Select the type of sub-recipient from the **Sub-recipient Type*** dropdown menu.
 - a. If Sub-State is selected, select the sub-state name from the **Sub-State Name*** dropdown menu.

**Note:* The Sub-State Name dropdown menu is populated with the information added in the [Sub-State Information](#) module.
5. Enter a name for the sub-recipient in the **Sub-recipient Name*** text box.
6. Enter the street address for the sub-recipient in the **Sub-recipient Street Address*** text box.
7. Enter the city the sub-recipient resides in in the **Sub-recipient City*** text box.
8. Select the state the sub-recipient resides in from the **Sub-recipient State*** dropdown menu.
9. Enter the 5-digit zip code the sub-recipient resides in in the **Sub-recipient Zip Code*** text box.
10. If desired, enter the name of the sub-recipient's organization in the **Organization Name** text box.
11. Enter the name of the represented community/coalition in the **Name of Community/Coalition Represented by Sub-recipient*** text box.
12. Enter the location of the sub-recipient in the **Location of Sub-recipient (City, County, or Regional Area)*** text box.
13. Use the **Has this Sub-recipient been funded?*** radio buttons to select if the sub-recipient has received funding.
 - a. If Yes was selected new fields will populate.
 - i. Enter the date the sub-recipient was funded in the **Date Funded*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the [Calendar Feature](#) section for additional details.)
14. Enter the amount of money the sub-recipient was awarded in the **Amount Awarded per year*** text box.
15. Enter the location of the sub-recipient in the **Location of Sub-recipient (City, County, or Regional Area)*** text box.

Screenshot displaying the Sub-Recipient Edit Form – this is a partial screenshot

16. Select the status of the sub-recipient in the **Subrecipient Status*** dropdown menu.
17. Use the **Has this Sub-recipient been funded?*** radio buttons to select if the sub-recipient has received funding.
 - a. If Yes was selected new fields will populate.
 - i. Enter the date the sub-recipient was funded in the **Date Funded*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the [Calendar Feature](#) section for additional details.)
 - ii. Enter the amount of money the sub-recipient was awarded in the **Amount Awarded per year*** text box.
18. **Briefly describe where the sub-recipient is in the SPF process and their accomplishments to date*** in the text field.
19. Click the  **(Save)** button.

Note:* Click the  **(Cancel) button to cancel this entry.



Sample screenshot displaying the Sub-Recipient Edit Form – this is a partial screenshot

Editing a Sub-Recipient

1. Click **Implementation** from the Menu.
2. Click **Sub-Recipient** from the Implementation Landing Page.
3. From the Listing Page, select the sub-recipient you wish to edit by clicking the appropriate Sub-recipient Name.
4. Make any changes needed to the form.
5. Click the **Save** (Save) button.
 *Note: Click the **Cancel** (Cancel) button to cancel this entry.

Deleting a Sub-Recipient

1. Click **Implementation** from the Menu.
2. Click **Sub-Recipient** from the Implementation Landing Page.
3. From the Listing Page, select the sub-recipient you wish to edit by clicking the appropriate Sub-recipient Name.
4. Click the **Delete** (Delete) button.
 *Note: Click the **Cancel** (Cancel) button to cancel this entry.
5. The record will be removed from the grid.

MRT
Management Reporting Tool

Helen F SPF

Home Assessment Capacity Planning **Implementation** Evaluation Administration

Home Implementation Sub-Recipient

Sub-Recipient Online Training Video

Sub-Recipient

Use this section to enter any sub-recipients who have been funded. Each sub-recipient will be listed in the table below. Use the table heading links to sort sub-recipients by column. Click the Add Sub-recipient button to add a new sub-recipient or click on the sub-recipient name that you've assigned to each sub-recipient to edit or delete a record.

Add Sub-recipient

Sub-recipient Name	Location Name	Amount Awarded per Year	Date Funded
Allegheny ACTION	Allegheny County	7000.00	6/24/2010
Allegheny County	Allegheny County	32000.00	12/1/2010
Allegheny Youth Advancement Program	North Side of the City	15000.00	1/5/2010
Allegheny Youth Advocacy	Allegheny County At-Risk Youth	75000.00	12/1/2009
Cabell County	Cabell County Dept of HHS	15000.00	1/21/2010
Clearfield Substance Abuse Counseling Center	Clearfield Twp	56000.00	5/19/2010
Hanshaw County	Hanshaw County	0	
Hope & Recovery Coalition	Hope & Recovery Coalition	15000.00	10/10/2009
Mount Washington Community	Mt. Washington CDC	80000.00	7/1/2009
No Drugs Coalition	No Drugs Coalition	100000.00	12/12/2009
River Valley Initiative	Rural Townships of the River Valley	100000.00	7/1/2009
South End Healthy Coalition	South End Healthy Coalition	5000.00	12/3/2009
Substance Abuse Coalition	Substance Abuse Coalition	80000.00	7/1/2009

Sample screenshot displaying the Sub-Recipient Listing Page

Has this Sub-recipient been funded?* ☐ No ☒ Yes

Date Funded* 6/24/2010 (mm/dd/yyyy)

Amount Awarded per year* \$ 7000.00

Briefly describe where this sub-recipient is in the SPF process and their accomplishments to date.* This SubRecipient is implementing Strategies.

Delete button

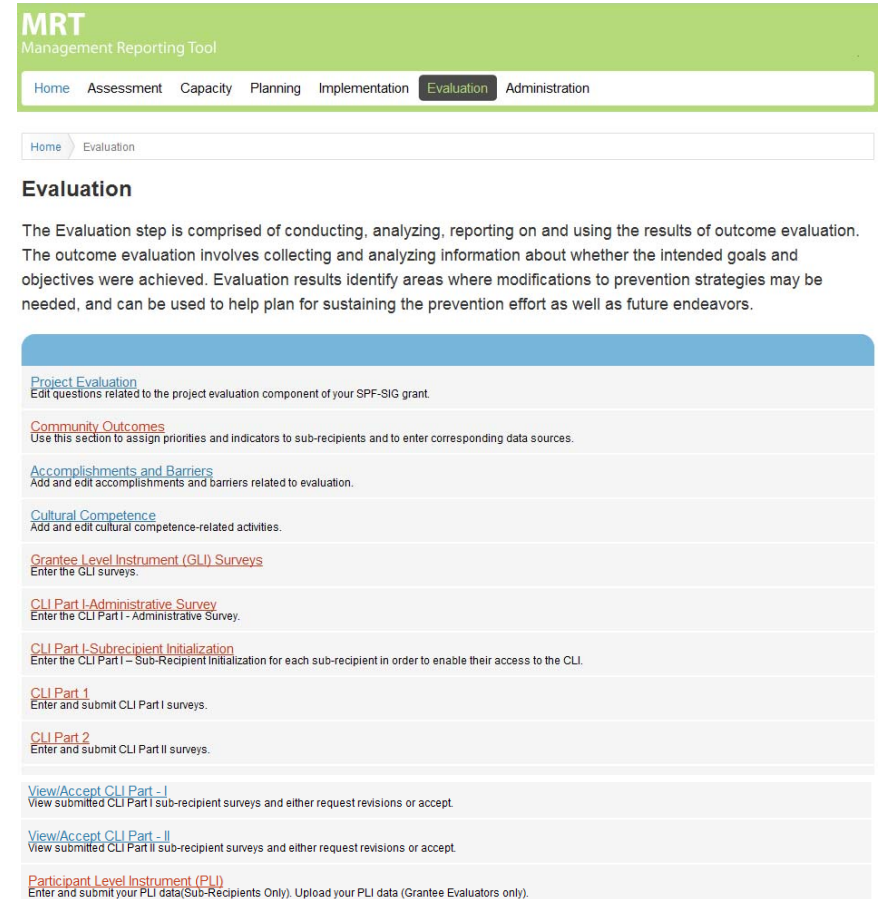
Save Cancel Delete

Sample screenshot displaying the Sub-Recipient Edit Form – this is a partial screenshot

EVALUATION

Within the Evaluation module, a user is able to perform the following tasks:

1. Enter Grantee Level Instrument (GLI) Surveys.
2. Enter CLI Part I-Administrative Survey.
3. Enter CLI Part I-Sub-recipient Initialization.
4. Enter CLI Part I.
5. Enter CLI Part II.
6. View/Accept CLI Part I.
7. View/Accept CLI Part II.
8. Participant Level Instrument (PLI)
9. Create PLI User Accounts



Screenshot displaying the Evaluation Landing Page

Grantee Level Instrument (GLI) Infrastructure Survey

The Strategic Prevention Framework State Incentive Grant Grantee Level Instrument Infrastructure Survey (SPF SIG GLI Infrastructure Survey) is designed to collect information at the jurisdiction (state, tribe, territory) level. This survey should be completed twice over the life of the Grant.

Entering the GLI Infrastructure Survey

1. Click **Evaluation** from the Menu.
2. Click **Grantee Level Instrument (GLI) Surveys** from the Evaluation Landing Page.
3. Click the [GLI Infrastructure](#) (GLI Infrastructure) link from the Grantee Level Instrument (GLI) Surveys listing page.
4. A new window will open displaying the survey.
5. Answer each question by filling in the appropriate radio button, check boxes, or text field.
6. Click the **Next** (Next) button to move to the next page or use the **Back** (Back) button to return to a previous page.
7. Once you have answered all the questions, click the **Done** (Done) button.
*Note: The final page is to be completed by the Project Director.
8. Click the **Close** (Close) button to close the window.
9. Click the **Print Response** (Print Response) button to print the survey.

*Note: The Progress Bar at the top of each page shows how much of the survey has been completed.

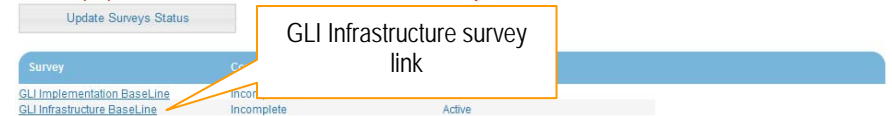
Tips

- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.

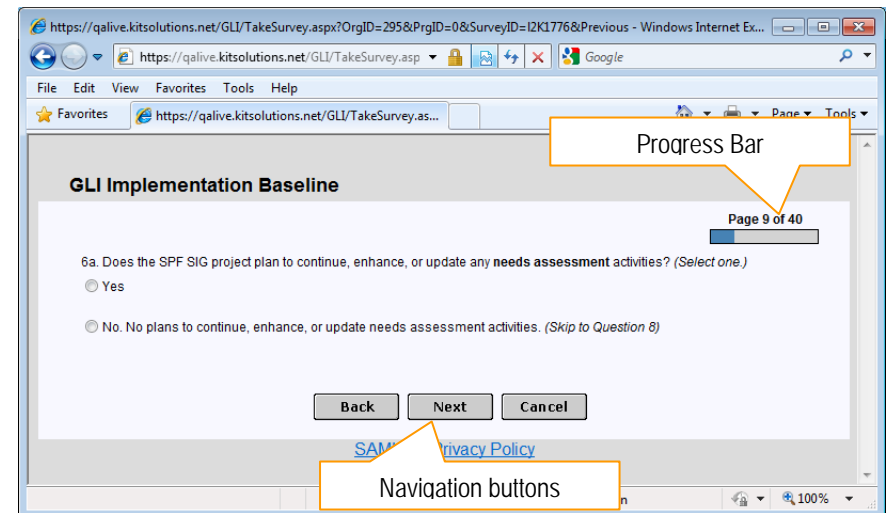
Grantee Level Instrument (GLI) Surveys

Use this section to enter GLI Surveys.

Note: Pop-up blockers must be disabled in order to view surveys.



Screenshot displaying page 1 of the GLI Infrastructure Survey



Screenshot displaying the GLI Infrastructure Survey

Grantee Level Instrument (GLI) Implementation Survey

The Strategic Prevention Framework State Incentive Grant Grantee Level Instrument Implementation Survey (SPF SIG GLI Implementation Survey) is designed to collect information at the jurisdiction (state, tribe, territory) level. This survey should be completed twice over the life of the grant.

Enter the GLI Implementation Survey

1. Click **Evaluation** from the Menu.
2. Click **Grantee Level Instrument (GLI) Surveys** from the Evaluation Landing Page.
3. Click the [GLI Implementation](#) (GLI Implementation) link from the Grantee Level Instrument (GLI) Surveys listing page.
4. A new window will open displaying the survey.
5. Answer each question by filling in the appropriate radio button, check boxes, or text field.
6. Click the **Next** (Next) button to move to the next page or use the **Back** (Back) button to return to a previous page.
7. Once you have answered all the questions, click the **Done** (Done) button.
*Note: The final page is to be completed by the Project Director.
8. Click the **Close** (Close) button to close the window.
9. Click the **Print Response** (Print Response) button to print the survey.

*Note: The Progress Bar at the top of each page shows how much of the survey has been completed.

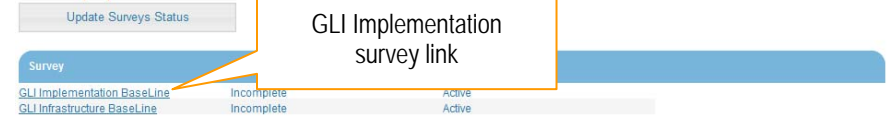
Tips

- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.

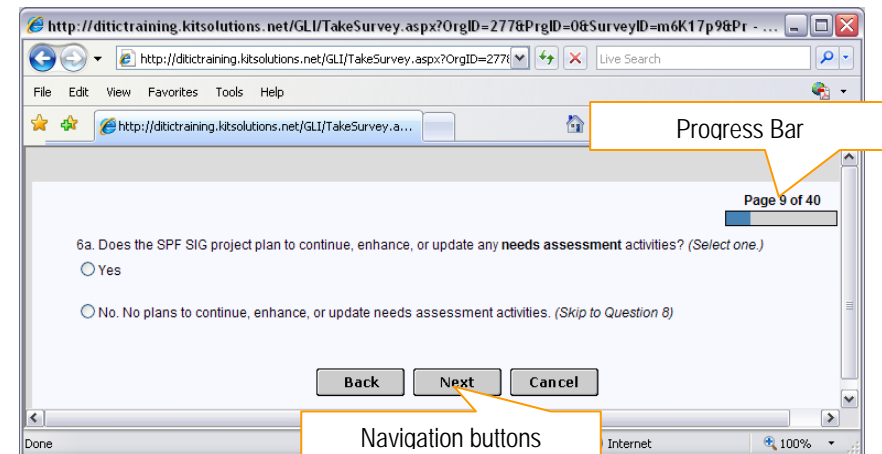
Grantee Level Instrument (GLI) Surveys

Use this section to enter GLI Surveys.

Note: Pop-up blockers must be disabled in order to view surveys.



Screenshot displaying page 1 of the GLI Implementation Survey



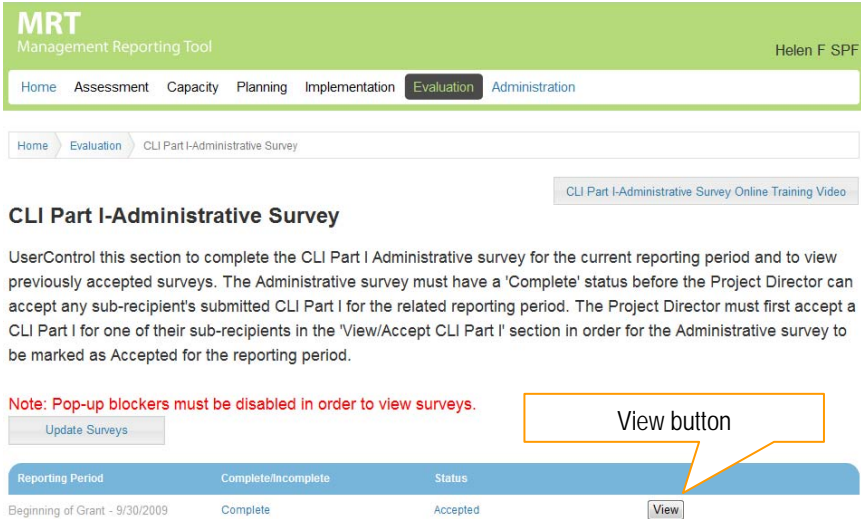
Screenshot displaying the GLI Implementation Survey

CLI Part I-Administrative Survey

The CLI Part I-Administrative module allows the user to enter their CLI Part I-Administrative Survey.

Entering the CLI Part I-Administrative Survey

- 1. Click **Evaluation** from the Menu.
- 2. Click **CLI Part I-Administrative Survey** from the Evaluation Landing Page.
- 3. Click the link of the appropriate Reporting Period.
 - a. If the status of the survey is Accepted, click the **View** (View) button to open the survey.
- 4. A new window will open displaying the survey.



Sample screenshot displaying the CLI Part I-Administrative Survey Listing Page

5. Answer each question by filling in the appropriate radio button, check boxes, or text field.
6. Click the **Next** (Next) button to move to the next page or use the **Back** (Back) button to return to a previous page.
7. Once you have answered all the questions, click the **Done** (Done) button.
8. Click the **Close** (Close) button to close the window.

***Note:** The Progress Bar at the top of each page shows how much of the survey has been completed.

Screenshot displaying the CLI Part I-Administrative Survey

Tips

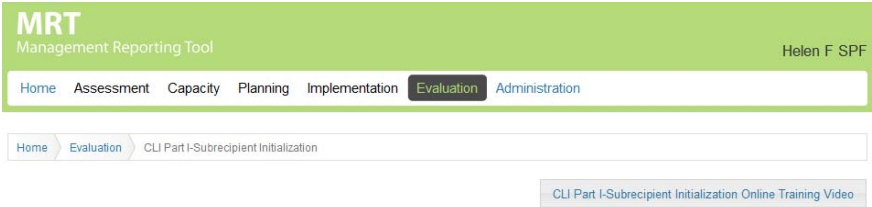
- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.
- Once you complete the survey, the completion/incompletion status of the survey will not update automatically. Click the **Update Surveys** (Update Surveys) button to update the status.
- Once the previous reporting period is in Accepted status, the link for the next reporting period will become available.

CLI Part I-Sub-recipient Initialization

In order to provide the Sub-recipient community with access to the CLI Part I and Part II surveys a login account must be created for the Sub-recipient. The CLI Sub-recipient Initialization module allows the Grantee to create Sub-recipient contacts for the Sub-recipient communities. The Sub-recipient communities listed on the Sub-recipient Initialization Listing Page are those previously entered in Implementation>Sub-recipient.

Adding a Sub-recipient Initialization Contact

- 1. Click **Evaluation** from the Menu.
- 2. Click **CLI Part I-Sub-recipient Initialization** from the Evaluation Landing Page.
- 3. From the Listing Page, select the Sub-Recipient Name.



CLI Part I-Subrecipient Initialization

Use this section to provide sub-recipients with access to the CLI. Each sub-recipient previously saved under Implementation > Sub-recipient will be listed in the table below. Click the sub-recipient name that you've assigned to each sub-recipient to edit a record.


Sub-Recipient Name	Sub-Recipient ID
River Valley Initiative	
Hope & Recovery Coalition	
No Drugs Coalition	
South End Health Coalition	781
Substance Abuse Coalition	782
Mount Washington Community	783
Allegheny County	784
Allegheny Youth Advocacy	785
Allegheny	786
Clearfield Substance Abuse Counseling Center	787
Allegheny Youth Advancement Program	788
Allegheny ACTION	789
Hanshaw County	790
Cabell County	792

Sample screenshot displaying the CLI Part I-Sub-recipient Initialization Listing Page

4. The **Name of Sub-recipient Community*** and **Unique ID of the Sub-recipient** have been filled out for you.
5. Enter the date the Sub-recipient community began receiving funds in the **Indicate the month and year this sub-recipient community began receiving SPF-SIG funds*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the [Calendar Feature](#) section for additional details.)
6. Enter the date the Sub-recipient community's funding is scheduled to end in the **Indicate the month and year SPF-SIG funding for this sub-recipient community is scheduled to end for the overall project*** text box as mm/dd/yyyy or use the Calendar feature to select the date.

7. Enter the Sub-recipient community's Contact in the **Primary Sub-recipient Contact Info** fields.
 - a. Enter the contact's first name in the **First Name*** text box.
 - b. Enter the contact's last name in the **Last Name*** text box.
 - c. Enter the contact's phone number in the **Telephone number*** text box.
 - d. Enter the contact's email address in the **E-mail address*** text box.
 - e. Use the radio buttons to answer **Does this sub-recipient have a secondary contact?***.
 - i. If Yes is selected, new fields will appear. Enter the **Secondary Sub-recipient Contact Info**.

8. Click the  **(Save)** button.

*Note: Click the  **(Cancel)** button to cancel this entry.

Tips

- Once the Sub-recipient Initialization form is saved, an email with login information will be sent to the Contact(s) specified for the Sub-recipient community.

CLI Part I-Subrecipient Initialization

The sub-recipient communities listed below are those previously entered in Implementation > Subrecipient. In order to provide the sub-recipient community with access to the CLI, the record must be updated and saved. To edit a record, click on the Sub-recipient Community Name.

Note: By clicking on 'Save' you are granting the subrecipient contact(s) an account to access to the CLI. Be sure to only 'Save' this record when you are ready to have the subrecipient community enter data into the system..

You may now Add a record

CLI Part I-Subrecipient Initialization	
14. Name of Subrecipient Community:*	River Valley Initiative
15. Unique ID of the Subrecipient:*	774
16. Indicate the month and year this subrecipient community began receiving SPF-SIG funds: (mm/yyyy)	<input type="text"/> (mm/dd/yyyy)
17. Indicate the month and year SPF-SIG funding for this subrecipient community is scheduled to end for the overall project: (mm/yyyy)	<input type="text"/> (mm/dd/yyyy)

Sample screenshot displaying the CLI Part I-Sub-recipient Initialization Edit Form – this is a partial screenshot

Primary Subrecipient Contact Info	
First Name:*	<input type="text"/> 250 characters maximum.
Last Name:*	<input type="text"/> 250 characters maximum.
Telephone number:*	<input type="text"/> 250 characters maximum.
E-mail address :*	<input type="text"/> 250 characters maximum.
Does this subrecipient have a secondary contact?*	<input type="radio"/> Yes <input type="radio"/> No
<div>Save button</div> <div> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </div>	

Screenshot displaying the Primary Sub-recipient Contact Info fields on the CLI Part I-Sub-recipient Initialization Edit – this is a partial screenshot

Editing a Sub-recipient Initialization Contact

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I-Sub-recipient Initialization** from the Evaluation Landing Page.
3. From the Listing Page, select the Sub-recipient community you wish to edit by clicking the appropriate Sub-Recipient Name.
4. Make any changes needed to the form.
5. Click the (**Save**) button.

*Note: Click the (**Cancel**) button to cancel this entry.



[CLI Part I-Subrecipient Initialization Online Training Video](#)

CLI Part I-Subrecipient Initialization

Use this section to provide sub-recipients with access to the CLI. Each sub-recipient previously saved under Implementation > Sub-recipient will be listed in the table below. Click the sub-recipient name that you've assigned to each sub-recipient to edit a record.

Sub-Recipient Name	Sub-Recipient ID
River Valley Initiative	
Hope & Recovery Coalition	
No Drugs Coalition	780
South End Healthy Coalition	781
Substance Abuse Coalition	782
Mount Washington Community	783
Allegheny County	784
Allegheny Youth Advocacy	785
Allegheny	786
Clearfield Substance Abuse Counseling Center	787
Allegheny Youth Advancement Program	788
Allegheny ACTION	789
Hanshaw County	790
Cabell County	792

Sub-recipient Name link

Sample screenshot displaying the CLI Part I-Sub-recipient Initialization Listing Page

Tips

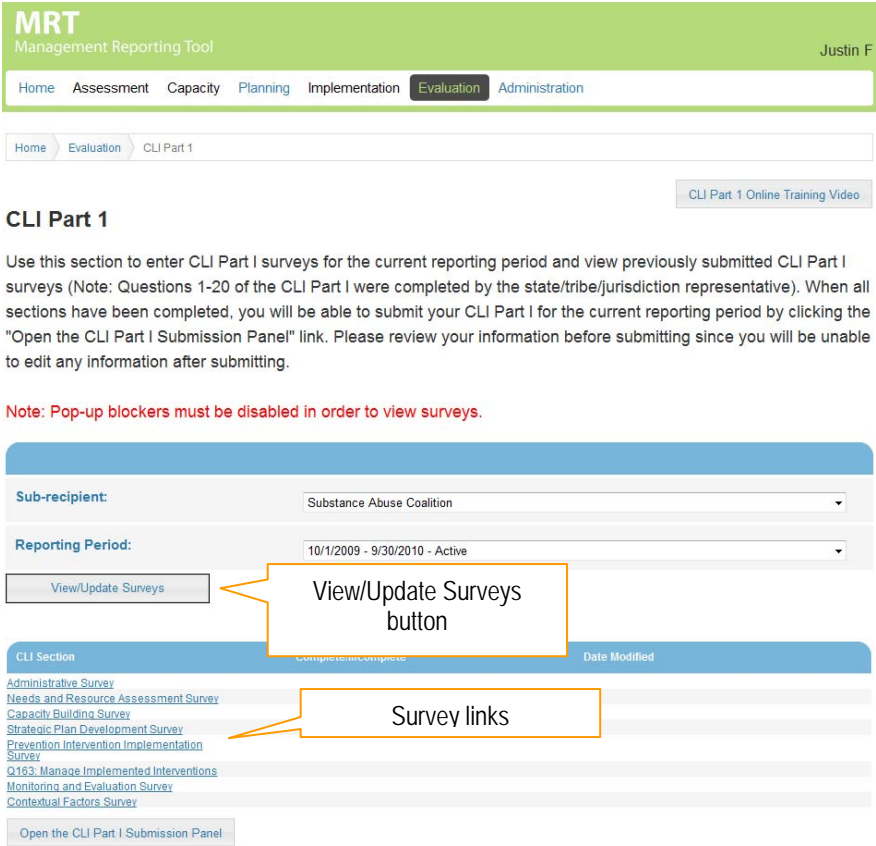
- Once saved, some fields will be locked and cannot be modified.

CLI Part I

The CLI Part I module is to be completed by the Grantee's Sub-recipient communities.

Entering a CLI Part I Survey

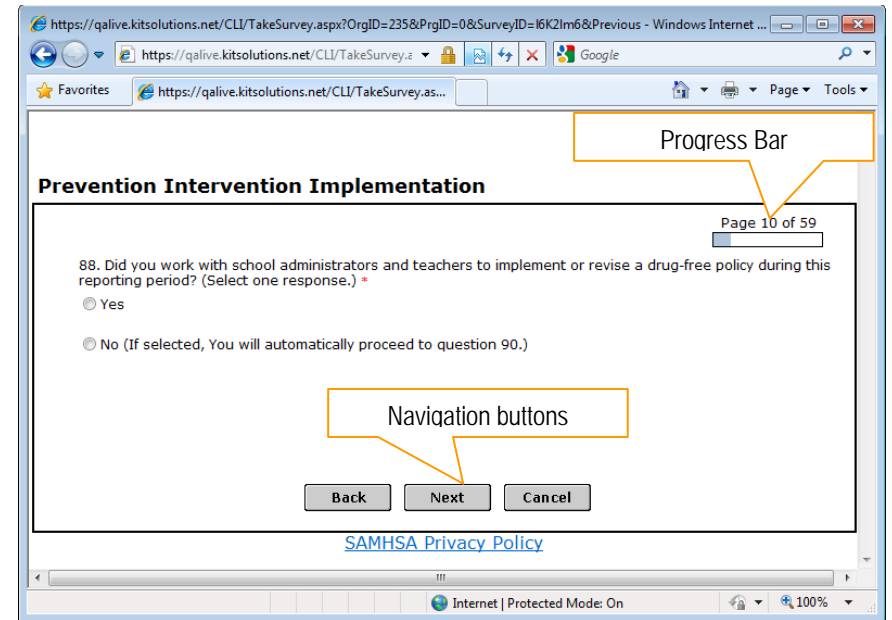
1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
**Note:* This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the Active reporting period from the **Reporting Period*** dropdown menu.
5. Click the [View/Update Surveys](#) (View/Update Surveys) button.
6. Click a Survey link to begin completing a survey.
7. A new window will open displaying the selected Survey.



Sample screenshot displaying the CLI Part I Listing Page

8. Answer each question by filling in the appropriate radio button, check boxes, or text field.
9. Click the **Next** (Next) button to move to the next page or use the **Back** (Back) button to return to a previous page.
10. Once you have answered all the questions, click the **Done** (Done) button.
11. Click the **Close** (Close) button to close the window.

***Note:** The Progress Bar at the top of each page shows how much of the survey has been completed.



Screenshot displaying one of the CLI Part I Surveys



Tips

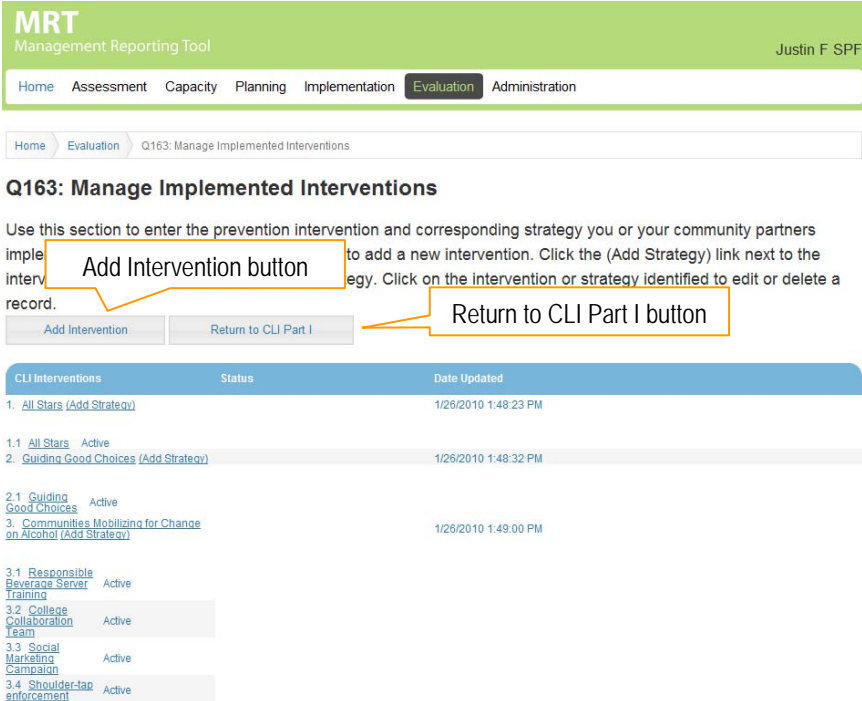
- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.
- Click the **View/Update Surveys** (View/Update Surveys) button to update the Status of your surveys.

Q163: Manage Implemented Interventions

The Manage Implemented Interventions module allows the Sub-recipients to add interventions and strategies. At least one (1) intervention and one (1) strategy must be entered in order to submit the CLI Part I.



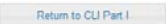
Adding an Intervention

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
**Note:* This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the  (**View/Update Surveys**) button.
6. Click the [Q163: Manage Implemented Interventions](#) (**Q163: Manage Implemented Interventions**) link.
7. Click the  (**Add Intervention**) button.







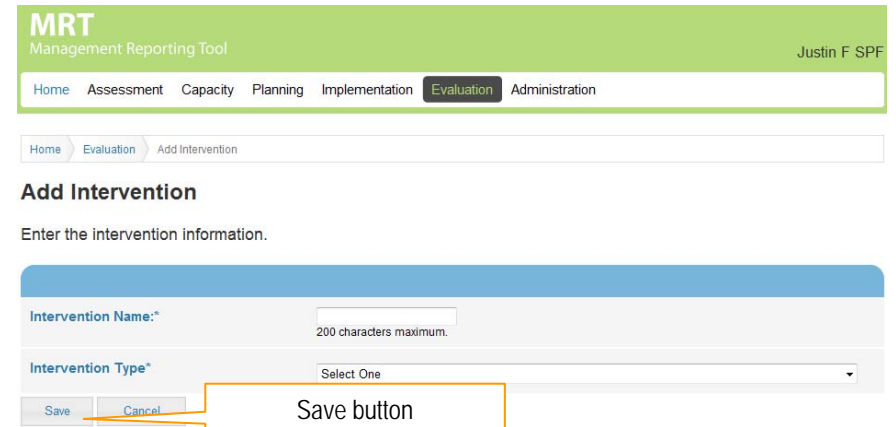
CLI Interventions	Status	Date Updated
1. All Stars (Add Strategy)		1/26/2010 1:48:23 PM
1.1 All Stars	Active	
2. Guiding Good Choices (Add Strategy)		1/26/2010 1:48:32 PM
2.1 Guiding Good Choices	Active	
3. Communities Mobilizing for Change on Alcohol (Add Strategy)		1/26/2010 1:49:00 PM
3.1 Responsible Beverage Server Training	Active	
3.2 College Collaboration Team	Active	
3.3 Social Marketing Campaign	Active	
3.4 Shoulder-clip enforcement	Active	

Sample screenshot displaying the Manage Implemented Interventions Listing Page

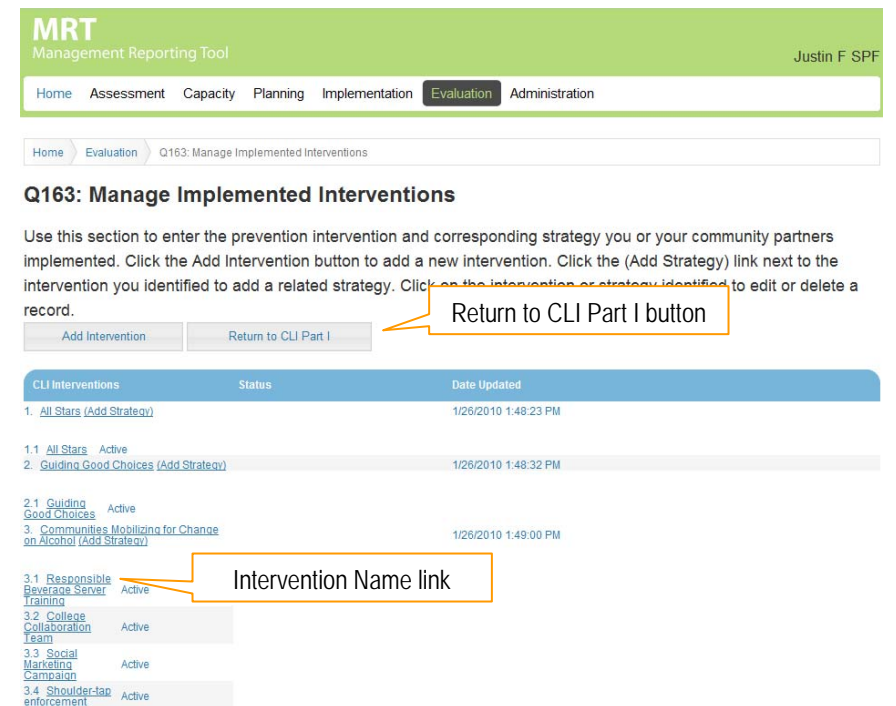
8. Enter a name for the intervention in the **Intervention Name*** text box.
9. Select the type of intervention from the **Intervention Type*** dropdown menu.
10. Click the  **(Save)** button.
- *Note: Click the  **(Cancel)** button to cancel this entry.
11. Click the  **(Return to CLI Part I)** button.

Editing an Intervention

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
- *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the  **(View/Update Surveys)** button.
6. Click the [Q163: Manage Implemented Interventions](#) **(Q163: Manage Implemented Interventions)** link.
7. From the Listing Page, select the intervention name you wish to edit by clicking the appropriate CLI Intervention name.
8. Make any changes needed to the form.
9. Click the  **(Save)** button.
- *Note: Click the  **(Cancel)** button to cancel this entry.
10. Click the  **(Return to CLI Part I)** button.






Screenshot displaying the Manage Implemented Interventions Edit Form

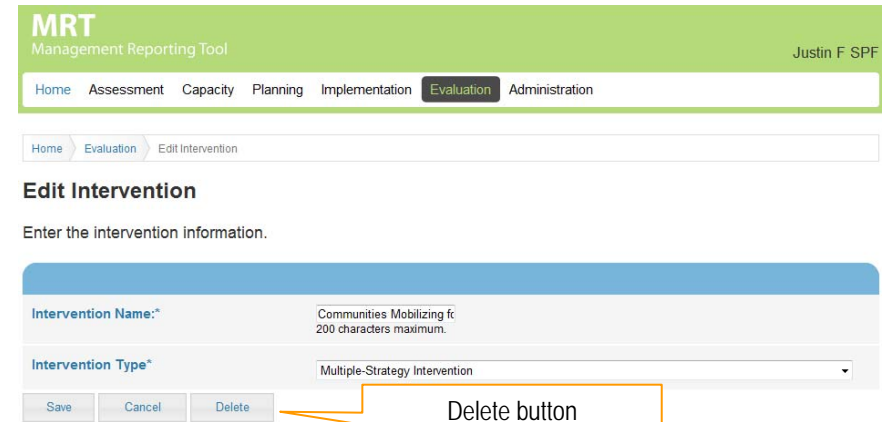


CLI Interventions	Status	Date Updated
1. All Stars (Add Strategy)		1/26/2010 1:48:23 PM
1.1 All Stars	Active	
2. Guiding Good Choices (Add Strategy)		1/26/2010 1:48:32 PM
2.1 Guiding Good Choices	Active	
3. Communities Mobilizing for Change on Alcohol (Add Strategy)		1/26/2010 1:49:00 PM
3.1 Responsible Beverage Server Training	Active	
3.2 College Collaboration Team	Active	
3.3 Social Marketing Campaign	Active	
3.4 Shoulder-tap enforcement	Active	

Sample screenshot displaying the Manage Implemented Interventions Listing Page

Deleting an Intervention

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
**Note:* This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the  (**View/Update Surveys**) button.
6. Click the [Q163: Manage Implemented Interventions](#) (**Q163: Manage Implemented Interventions**) link.
7. From the Listing Page, select the intervention name you wish to delete by clicking the appropriate CLI Intervention name.
8. Click the  (**Delete**) button.
Note:* Click the  (Cancel**) button to cancel this entry.
9. The record will be removed from the grid.




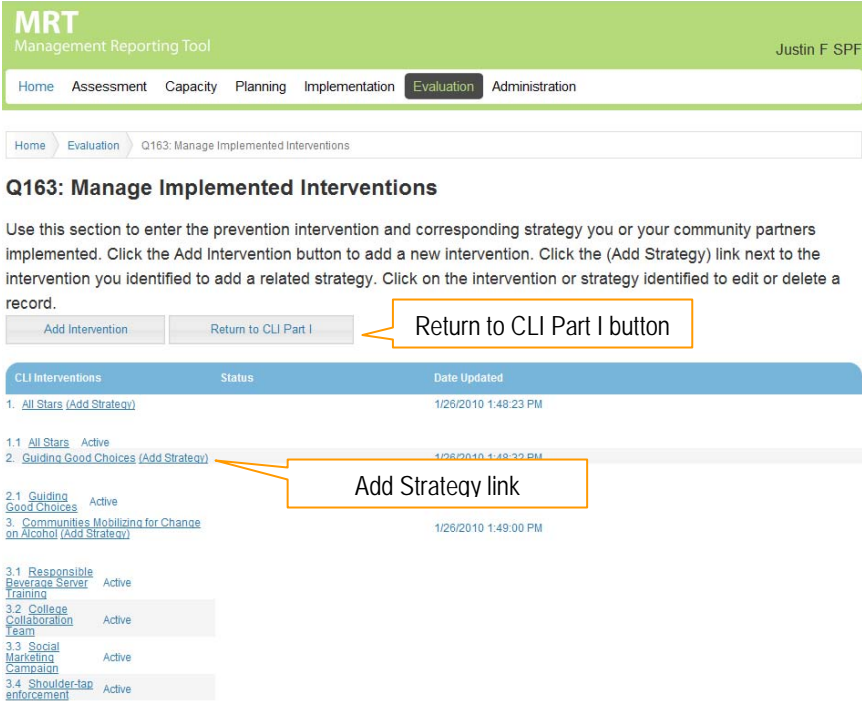
Sample screenshot displaying the Manage Implemented Interventions Edit Form

Q163: Manage Implemented Interventions – Strategies

Strategies are added to the identified Interventions. At least one (1) intervention and one (1) strategy must be entered in order to submit the CLI Part I.

Adding a Strategy

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
**Note:* This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the  (**View/Update Surveys**) button.
6. Click the [Q163: Manage Implemented Interventions](#) (**Q163: Manage Implemented Interventions**) link.
7. Click the [\(Add Strategy\)](#) (**Add Strategy**) link.



MRT
Management Reporting Tool
Justin F SPF

Home Assessment Capacity Planning Implementation **Evaluation** Administration

Home Evaluation Q163: Manage Implemented Interventions



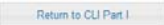
Q163: Manage Implemented Interventions

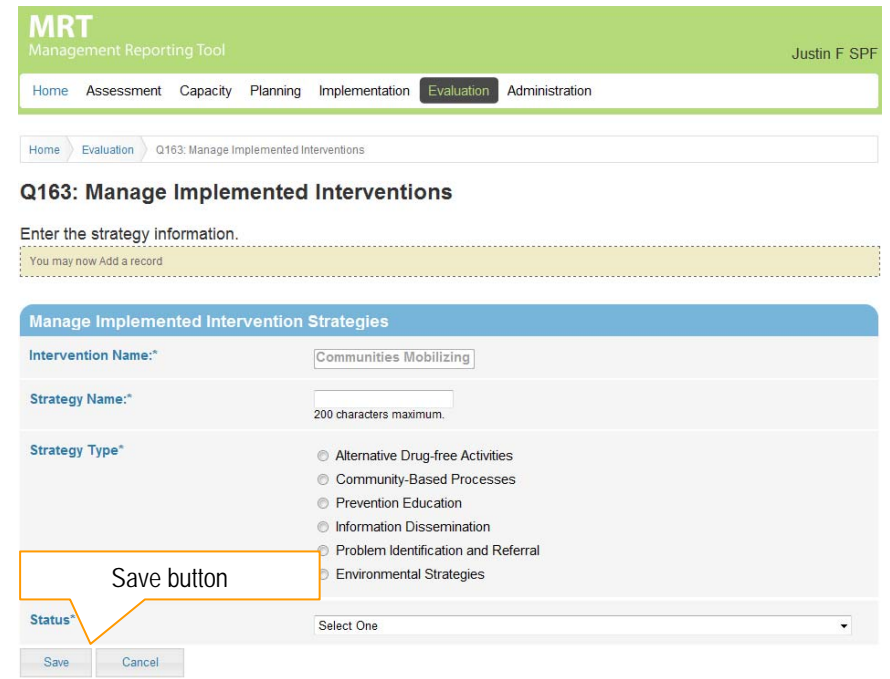
Use this section to enter the prevention intervention and corresponding strategy you or your community partners implemented. Click the Add Intervention button to add a new intervention. Click the (Add Strategy) link next to the intervention you identified to add a related strategy. Click on the intervention or strategy identified to edit or delete a record.

[Add Intervention](#) [Return to CLI Part I](#)

CLI Interventions	Status	Date Updated
1. All Stars (Add Strategy)		1/26/2010 1:48:23 PM
1.1 All Stars	Active	
2. Guiding Good Choices (Add Strategy)		1/26/2010 1:48:22 PM
2.1 Guiding Good Choices	Active	
3. Communities Mobilizing for Change on Alcohol (Add Strategy)		1/26/2010 1:49:00 PM
3.1 Responsible Beverage Server Training	Active	
3.2 College Collaboration Team	Active	
3.3 Social Marketing Campaign	Active	
3.4 Shoulder-clip enforcement	Active	

Sample screenshot displaying the Manage Implemented Interventions Listing Page

8. The **Intervention Name*** will be filled in for you.
9. Enter a name for the strategy in the **Strategy Name*** text box.
 *Note: If the intervention type was Single-Strategy Intervention the Strategy Name will be filled in for you.
10. Select the type of strategy using the **Strategy Type*** radio buttons.
 *Note: The selected Strategy Type will determine the sub-forms that will be completed in the CLI Part II.
11. Select the status of the strategy from the **Status*** dropdown menu.
 - a. Active: currently being implemented.
 - b. Discontinued: no longer being implemented.
 - c. Completed: completed or no longer in use.
 - i. If Completed is selected, enter the date the strategy was completed in the **Date Completed*** text box.
12. Click the  **(Save)** button.
 *Note: Click the  **(Cancel)** button to cancel this entry.
13. Click the  **(Return to CLI Part I)** button.



MRT
Management Reporting Tool
Justin F SPF

Home Assessment Capacity Planning Implementation **Evaluation** Administration

Home Evaluation Q163: Manage Implemented Interventions

Q163: Manage Implemented Interventions

Enter the strategy information.
You may now Add a record

Manage Implemented Intervention Strategies



Intervention Name* Communities Mobilizing

Strategy Name*
200 characters maximum.

Strategy Type*





- ☐ Alternative Drug-free Activities
- ☐ Community-Based Processes
- ☐ Prevention Education
- ☐ Information Dissemination
- ☐ Problem Identification and Referral
- ☐ Environmental Strategies

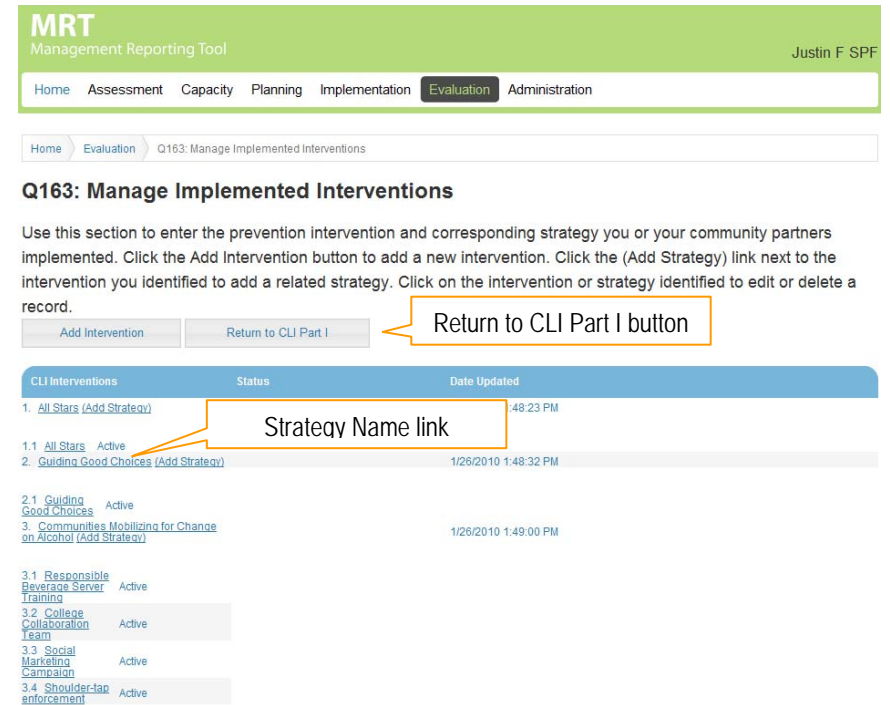
Status* Select One

Screenshot displaying the Add Strategy Edit Form

Editing a Strategy

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
*Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the  (**View/Update Surveys**) button.
6. Click the [Q163: Manage Implemented Interventions](#) (**Q163: Manage Implemented Interventions**) link.
7. From the Listing Page, select the strategy name you wish to edit by clicking the appropriate Strategy name.
8. Make any changes needed to the form.
9. Click the  (**Save**) button.
*Note: Click the  (**Cancel**) button to cancel this entry.
10. Click the  (**Return to CLI Part I**) button.





MRT
Management Reporting Tool
Justin F SPF

Home Assessment Capacity Planning Implementation **Evaluation** Administration

Home Evaluation Q163: Manage Implemented Interventions

Q163: Manage Implemented Interventions

Use this section to enter the prevention intervention and corresponding strategy you or your community partners implemented. Click the Add Intervention button to add a new intervention. Click the (Add Strategy) link next to the intervention you identified to add a related strategy. Click on the intervention or strategy identified to edit or delete a record.

  **Return to CLI Part I button**



CLI Interventions	Status	Date Updated
1. All Stars (Add Strategy)	Active	1/26/2010 1:48:23 PM
1.1 All Stars (Add Strategy)	Active	
2. Guiding Good Choices (Add Strategy)	Active	1/26/2010 1:48:32 PM
2.1 Guiding Good Choices (Add Strategy)	Active	
3. Communities Mobilizing for Change on Alcohol (Add Strategy)	Active	1/26/2010 1:49:00 PM
3.1 Responsible Beverage Server Training (Add Strategy)	Active	
3.2 College Collaboration Team (Add Strategy)	Active	
3.3 Social Marketing Campaign (Add Strategy)	Active	
3.4 Shoulder-clip enforcement (Add Strategy)	Active	

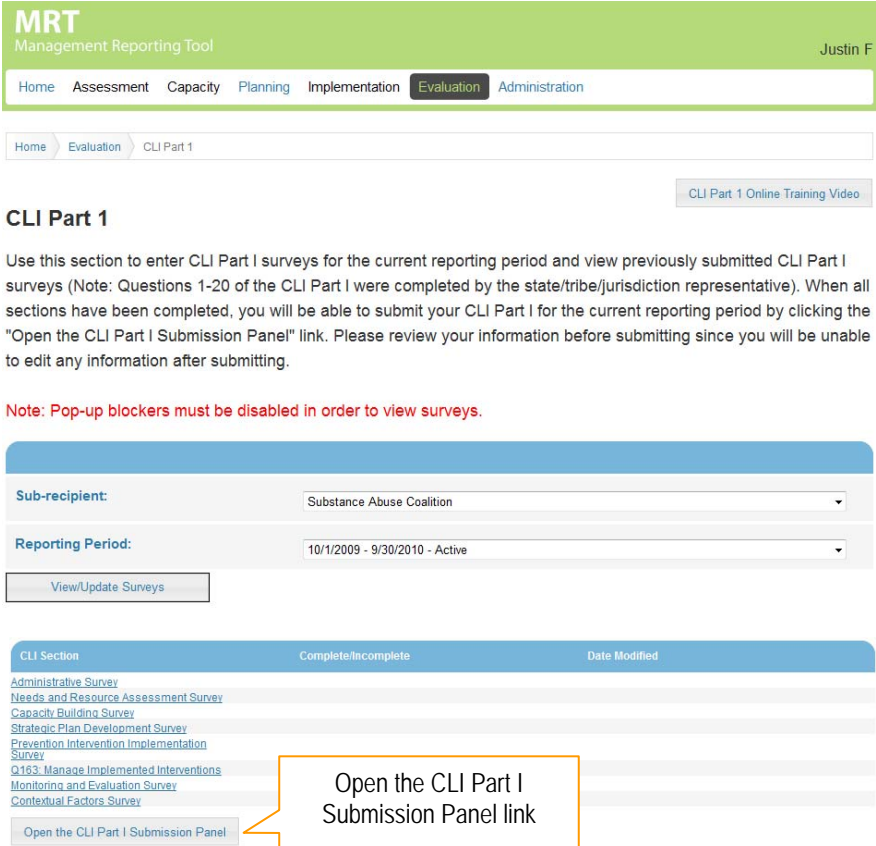
Sample screenshot displaying the Manage Implemented Interventions Listing Page

CLI Part I Submission



Once all of the CLI Part I surveys have been completed it can be submitted for review. The CLI Part I is submitted annually.


Submitting the CLI Part I

- 1. Click **Evaluation** from the Menu.
- 2. Click **CLI Part I** from the Evaluation Landing Page.
- 3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
*Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
- 4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
- 5. Click the  (**View/Update Surveys**) button.
- 6. Click the  (**Open the CLI Part I Submission Panel**) button.



Sample screenshot displaying the CLI Part I Listing Page

7. Enter the contact information of the person submitting the CLI Part I in the following fields: **Name**, **Title**, **Phone**, and **Email**.
8. Use the **I have read...** checkbox to indicate you understand the submission process.
9. Click the  (**Submit**) button to submit the report.
 *Note: Click the  (**Close Panel**) button to cancel the submission.

*Note: Once the  (**Submit**) button is selected, an email will be sent to the Contact person specified as well as the Grantee.

You are about to submit your CLI Part I for the reporting period: "10/1/2009 - 9/30/2010 - Active " Once you submit this information you will not have an opportunity to edit the CLI Part I.

Once submitted, the information will be reviewed by your project director. The project director will either accept the CLI Part I or request specific additions or modifications. If the CLI Part I is accepted, your work is done and you will receive feedback within 30 days of submission. If additions or modifications are requested, you will receive an email with specific instructions about what needs to be done. At that time, you will be given the ability to modify and resubmit your CLI Part I as instructed.

Name


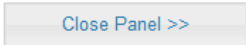
Title

Phone

Email

☐

I have read and understand the submission instructions and process.

Submit button

Screenshot displaying the CLI Part I Submission Panel

CLI Part II

The CLI Part II module is to be completed by the Grantee's Sub-recipient communities.

Entering a Sub-Form Survey

1. Click **Evaluation** from the Menu.
2. Click **CLI Part II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
*Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the [View/Update Surveys](#) (View/Update Surveys) button.
6. Click the **Sub-Form Surveys** tab.
7. Click the [\(Begin Sub-Form\)](#) (Begin Sub-Form) link.
8. A new window will open displaying the Sub-Form survey.

The screenshot displays the MRT Management Reporting Tool interface. At the top, there is a green header with the title 'MRT Management Reporting Tool' and a user name 'Justin F'. Below the header is a navigation bar with tabs: Home, Assessment, Capacity, Planning, Implementation, Evaluation (selected), and Administration. A breadcrumb trail shows 'Home > Evaluation > CLI Part 2'. A button for 'CLI Part 2 Online Training Video' is visible.

The main section is titled 'CLI Part 2' and contains a note: 'Use this section to enter CLI Part II surveys for the current reporting period and view previously submitted CLI Part II surveys. When all sections have been completed, you will be able to submit your CLI Part II for the reporting period listed below. Please review your information before submitting since you will be unable to edit any information after submitting.'

Below the note, there is a 'Note: Please review your information before submitting to view surveys.' followed by a 'View/Update Surveys button' callout. The form includes two dropdown menus: 'Sub-recipient:' with 'South End Healthy Coalition' selected, and 'Reporting Period:' with 'Beginning of Grant - 9/30/2009 - Active' selected. Below these are buttons for 'View/Update Surveys', 'Sub-Form Surveys', and 'Demographic Surveys'.

The 'Sub-Form Surveys' tab is active, showing a table with columns: 'Sub-Form Surveys', 'Complete/Incomplete', and 'Date Updated'. The table lists two main categories: '1. Life Skills' and '2. South End Intervention'. Under '1. Life Skills', there is a row for '1.1 Life Skills - Active' with a sub-link '1.1.1 Life Skills - SubForm', status 'Complete', date '3/17/2011', and a 'Delete' button. Under '2. South End Intervention', there is a row for '2.1 Guiding Good Choices - Active' with a sub-link '2.1.1 Guiding Good Choices - SubForm', status 'Complete', date '3/18/2011', and a 'Delete' button. A '2.2 Life Skills Training - Active' row has a sub-link '2.2.1 Life Skills Training - Active (Begin Sub-Form)' with a 'Begin Sub-Form link' callout. At the bottom, there is a button 'Open the CLI Part II Submission Panel'.

Sample screenshot displaying the CLI Part II Sub-Form Surveys Listing Page

9. Answer each question by filling in the appropriate radio button, check boxes, or text field.
10. Click the **Next** (Next) button to move to the next page or use the **Back** (Back) button to return to a previous page.
11. Once you have answered all the questions, click the **Done** (Done) button.
12. Click the **Close** (Close) button to close the window.

***Note:** The Progress Bar at the top of each page shows how much of the survey has been completed.

Screenshot displaying one of the CLI Part II Sub-Form Surveys

Tips

- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.
- Click the [View/Update Surveys](#) (View/Update Surveys) button to update the Status of your surveys

13. Once you have started a Sub-Form survey, the Begin Sub-Form link will be replaced by the Sub-Form name. The Sub-Form name will be the [Strategy Name] - SubForm. This is a link to view or modify the Sub-Form survey.

Sub-Form Surveys	Complete/Incomplete	Date Updated
1. Life Skills		
1.1 Life Skills - Active		
1.1.1 Life Skills - SubForm		
2. South End Intervention		
2.1 Guiding Good Choices - Active		
2.1.1 Guiding Good Choices - SubForm	Complete	3/18/2011
2.2 Life Skills Training - Active (Begin Sub-Form)		

Sample screenshot displaying the CLI Part II Sub-Form Surveys Listing Page -this is a partial screenshot

Entering a Demographic Survey

1. Click **Evaluation** from the Menu.
2. Click **CLI Part II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
 *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the [View/Update Surveys](#) (View/Update Surveys) button.
6. Click the **Demographics Surveys** tab.
7. Click the [Add Demographics](#) (Add Demographics) link.

MRT
Management Reporting Tool

Justin F

Home Assessment Capacity Planning Implementation **Evaluation** Administration

Home Evaluation CLI Part 2

CLI Part 2 Online Training Video

CLI Part 2

Use this section to enter CLI Part II surveys for the current reporting period and view previously submitted CLI Part II surveys. When all sections have been completed, you will be able to submit your CLI Part II for the reporting period listed below. Please review your information before submitting since you will be unable to edit any information after submitting.

Note: Pop-up View/Update Surveys button New surveys.

Sub-recipient: South End Healthy Coalition

Reporting Period: Beginning of Grant - 9/30/2009 - Active

View/Update Surveys

Sub-Form Surveys Demographic Surveys

Demographic Surveys	Complete/Incomplete	Date Updated	
1. Life Skills			
1.1 Life Skills - Active			
1.1.1 Life Skills Demographics Add Demographics			
1.1.1.1 10/10/2010 - 12/10/2010 (Edit Dates)	Complete	3/17/2011	Delete
2. South End Intervention			
2.1 Guiding Good Choices - Active			
2.1.1 Guiding Good Choices Demographics Add Demographics			
2.1.1.1 10/10/2009 - 12/12/2009 (Edit Dates)	Complete	3/18/2011	Delete
2.1.2.2 1/11/2010 - 6/2/2010 (Edit Dates)	Incomplete	3/18/2011	Delete
2.2 Life Skills Training - Active			
2.2.1 Life Skills Training Demographics Add Demographics			

Open the CLI Part II Submission Panel

Sample screenshot displaying the CLI Part II Demographics Surveys Listing Page

8. Enter the timeframe in the **Begin Date*** and **End Date*** text boxes as mm/dd/yyyy or use the Calendar feature to select the date. (See the [Calendar Feature](#) section for additional details.)
9. Click the (**Save**) button.
 *Note: Click the (**Close Panel**) button to cancel this entry
10. A new window will open displaying the Demographics survey.

Enter the dates for the time period for which you are entering data. For example, if you are entering data on a monthly basis, you would enter the dates for the beginning of the month through the end of the month.

Dates

Begin Date* (mm/dd/yyyy)

End Date* (mm/dd/yyyy)

Screenshot displaying the first page of the Demographics Survey

11. Answer each question by filling in the appropriate radio button, check boxes, or text field.
12. Click the (**Next**) button to move to the next page or use the (**Back**) button to return to a previous page.
13. Once you have answered all the questions, click the (**Done**) button.
14. Click the (**Close**) button to close the window.

*Note: The Progress Bar at the top of each page shows how much of the survey has been completed.

49. Of the total number of new participants served by this prevention strategy during this reporting period (reported in question 45), indicate how many were Hispanic/Latino and how many were non-Hispanic/Latino. The number of Non-Hispanic/Latino, Hispanic/Latino, and unknown should add up to the total of new participants reported in question 45. This response should be written as a whole number (e.g., 4) and not expressed as a percentage.

49a. Hispanic/Latino:*

49b. Non-Hispanic/Latino:*

49c. Hispanic Ethnicity Unknown:*

Navigation buttons

Screenshot displaying the Demographics Survey



Tips

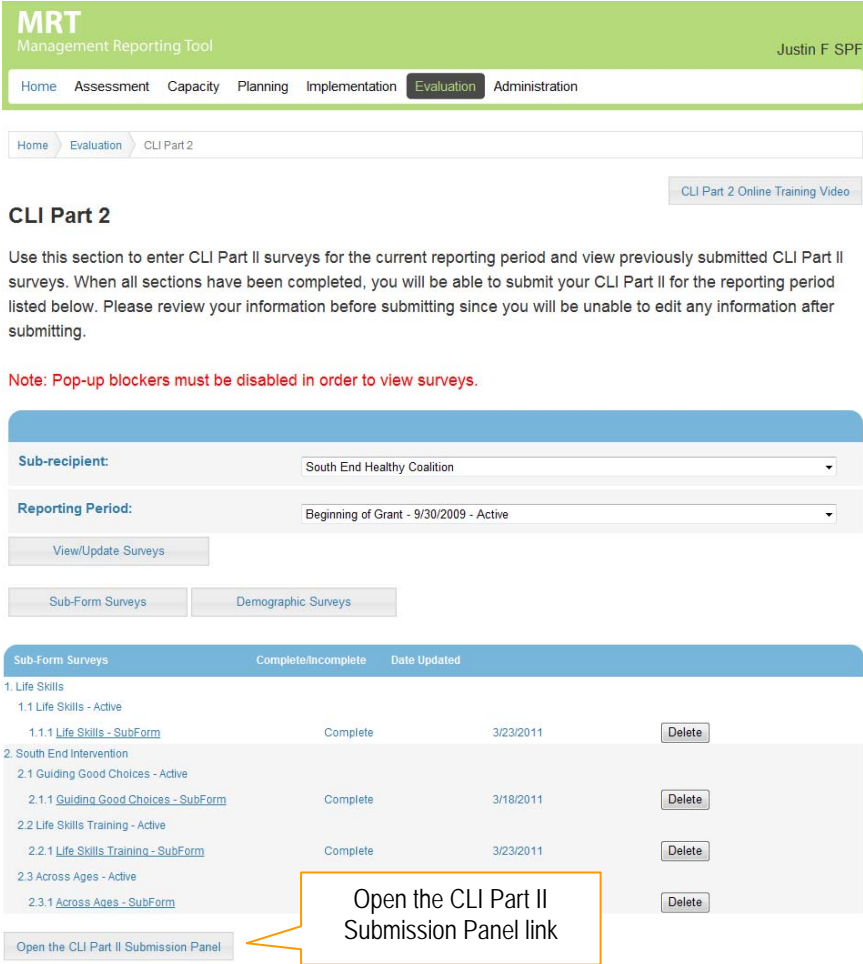
- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.
- Click the (**View/Update Surveys**) button to update the Status of your surveys.

CLI Part II Submission

Once all of the CLI Part II surveys have been completed it can be submitted for review. The CLI Part II is submitted every six (6) months.

Submitting the CLI Part II

1. Click **Evaluation** from the Menu.
2. Click **CLI Part II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
*Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the  (**View/Update Surveys**) button.
6. Click the  (**Open the CLI Part II Submission Panel**) button.



Sample screenshot displaying the CLI Part II Sub-form Surveys Listing Page

7. Enter the contact information of the person submitting the CLI Part II in the following fields: **Name**, **Title**, **Phone**, and **Email**.
8. Use the **I have read...** checkbox to indicate you understand the submission process.
9. Click the (**Submit**) button to submit the report.
 *Note: Click the (**Close Panel**) button to cancel the submission.

*Note: Once the (**Submit**) button is selected, an email will be sent to the Contact person specified as well as the Grantee.

Once submitted, the information will be reviewed by your project director. The project director will either accept the CLI Part II or request specific additions or modifications. If the CLI Part II is accepted, your work is done and you will receive feedback within 30 days of submission. If additions or modifications are requested, you will receive an email with specific instructions about what needs to be done. At that time, you will be given the ability to modify and resubmit your CLI Part II as instructed.

CLI Part II Submission

Name

Title

Phone

Email

I have read and understand the submission instructions and process.
 ☐





Submit button

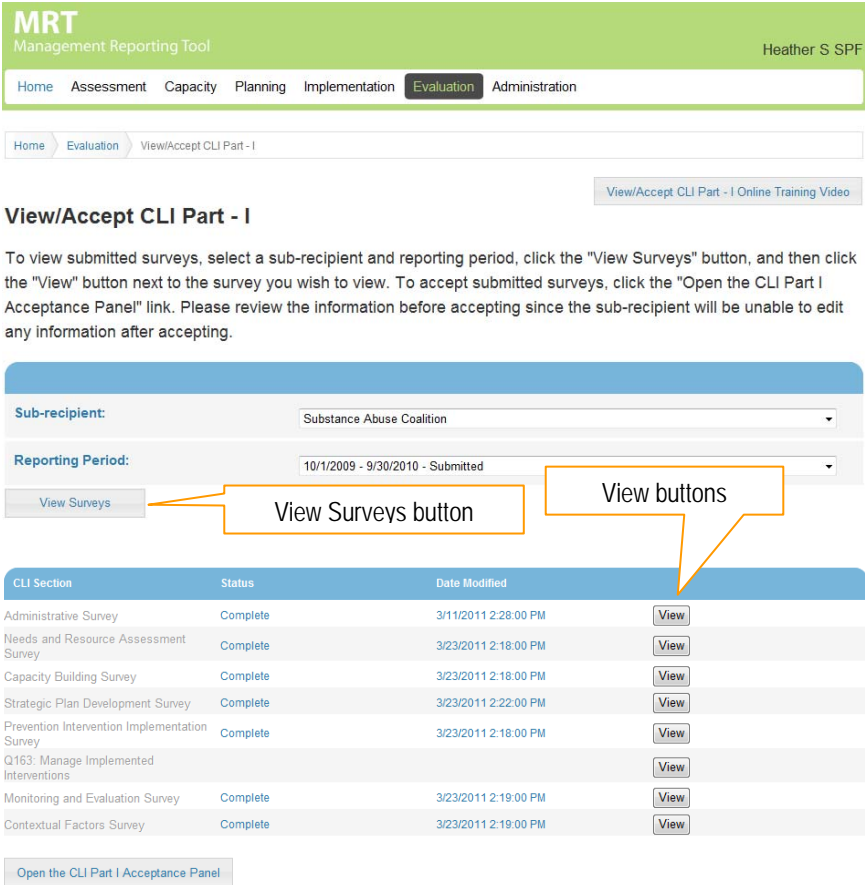
Screenshot displaying the CLI Part II Submission Panel

View/Accept CLI Part – I

The View/Accept CLI Part I module is used to view submitted CLI Part I Sub-recipient surveys to either request revision or accept it.

Viewing a Submitted CLI Part I

1. Click **Evaluation** from the Menu.
2. Click **View/Accept CLI Part - I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the  (**View Surveys**) button.
6. Click the  (**View**) button to the right of the survey you wish to view.
 - a. If you click the  (**View**) button to the right of Q163: Manage Implemented Interventions, you will be taken to the **Q163: Manage Implemented Interventions View** Listing Page. Click the name of the Intervention or Strategy Name to view the details.
7. A new window will open displaying the survey.
8. Click the  (**Done**) button to close the survey window.

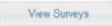
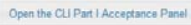


Sample screenshot displaying the View/Accept CLI Part I Listing Page

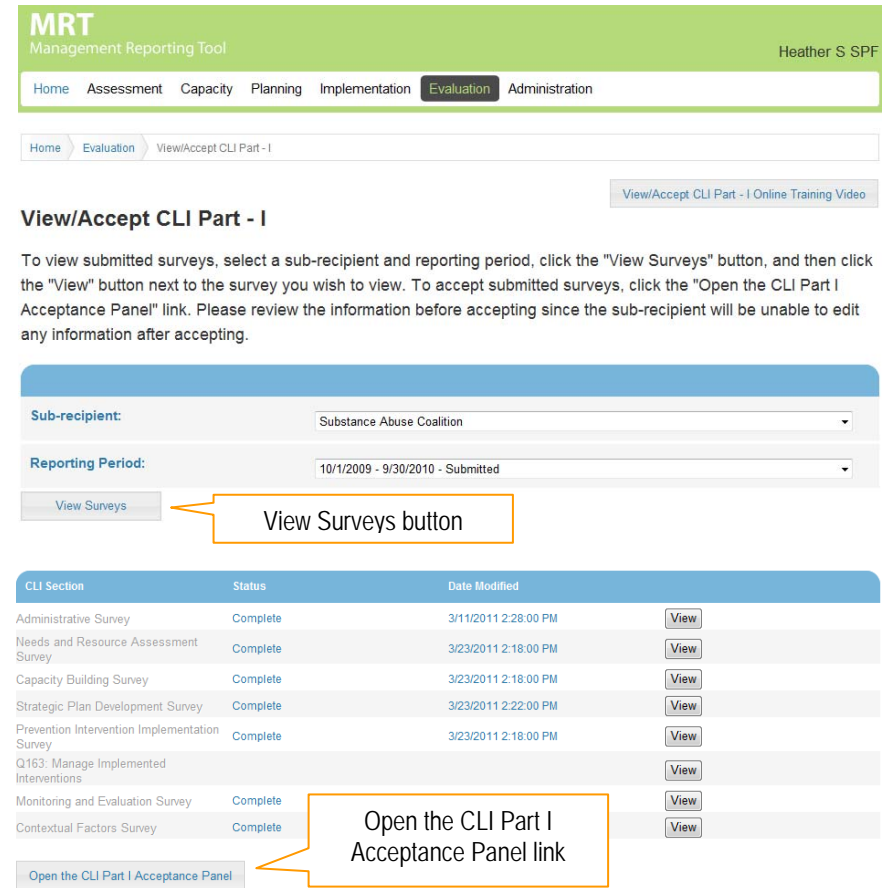
Tips

- You will need to turn off your pop-up blocker in order to open the survey.

Accepting a Submitted CLI Part I

1. Click **Evaluation** from the Menu.
2. Click **View/Accept CLI Part - I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the  (**View Surveys**) button.
6. Click the  (**Open the CLI Part I Acceptance Panel**) button.

***Note:** Only a user with a role of "Project Director" will have access to the  (**Open the CLI Part I Acceptance Panel**) button.



MRT
Management Reporting Tool
Heather S SPF

Home Assessment Capacity Planning Implementation **Evaluation** Administration

Home Evaluation View/Accept CLI Part - I

[View/Accept CLI Part - I Online Training Video](#)

View/Accept CLI Part - I

To view submitted surveys, select a sub-recipient and reporting period, click the "View Surveys" button, and then click the "View" button next to the survey you wish to view. To accept submitted surveys, click the "Open the CLI Part I Acceptance Panel" link. Please review the information before accepting since the sub-recipient will be unable to edit any information after accepting.

Sub-recipient: Substance Abuse Coalition



Reporting Period: 10/1/2009 - 9/30/2010 - Submitted


[View Surveys](#) **View Surveys button**

CLI Section	Status	Date Modified	
Administrative Survey	Complete	3/11/2011 2:28:00 PM	View
Needs and Resource Assessment Survey	Complete	3/23/2011 2:18:00 PM	View
Capacity Building Survey	Complete	3/23/2011 2:18:00 PM	View
Strategic Plan Development Survey	Complete	3/23/2011 2:22:00 PM	View
Prevention Intervention Implementation Survey	Complete	3/23/2011 2:18:00 PM	View
Q163: Manage Implemented Interventions			View
Monitoring and Evaluation Survey	Complete		View
Contextual Factors Survey	Complete		View

[Open the CLI Part I Acceptance Panel](#) **Open the CLI Part I Acceptance Panel link**

Sample screenshot displaying the View/Accept CLI Part I Listing Page


7. Using the radio buttons, select the acceptance status.
8. If desired, enter any notes needed for the Sub-recipient community in the **Notes** field.
9. Click the  **(Save)** button.
*Note: Click the  **(Close Panel)** button to cancel the acceptance.

*Note: Once the  **(Save)** button is selected, an email will be sent to the Grantee as well as the Sub-recipient community.



Screenshot displaying the CLI Part I Acceptance Panel




Tips

- If there is no reporting period within the Reporting Period dropdown list, it means the Sub-recipient community has not submitted their CLI Part I yet.
- Once a CLI Part I is accepted, the  **(Open the CLI Part I Acceptance Panel)** button will no longer be available for the accepted reporting period.

View/Accept CLI Part – II

The View/Accept CLI Part II module is used to view submitted CLI Part II Sub-recipient sub-forms and demographics to either request revision or accept it.

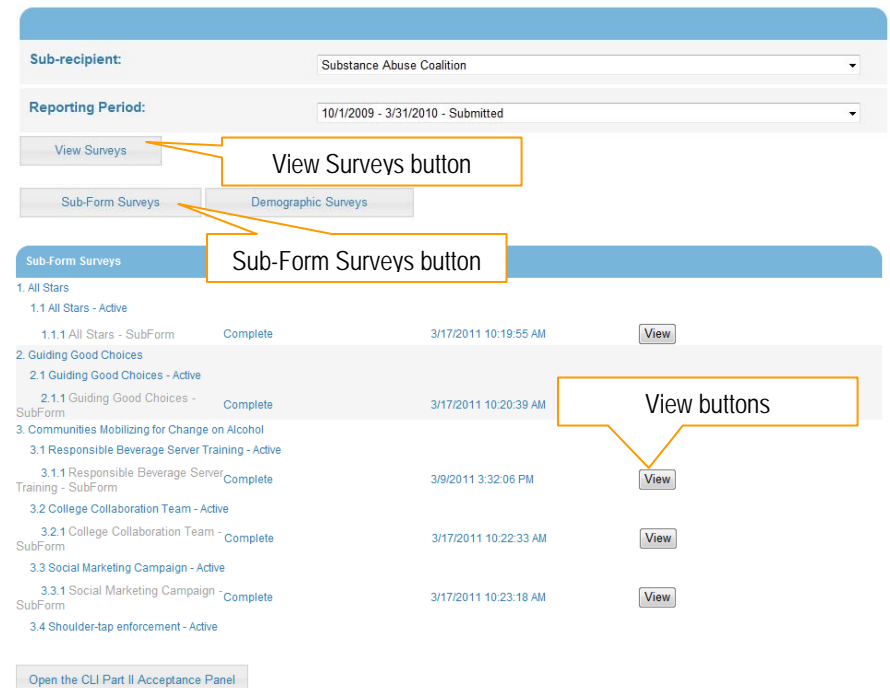
Viewing a Submitted CLI Part II Sub-form Survey

1. Click **Evaluation** from the Menu.
2. Click **View/Accept CLI Part - II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the  (**View Surveys**) button.
6. Click the **Sub-Form Surveys** tab.
7. Click the  (**View**) button to the right of the sub-form survey you wish to view.
8. A new window will open displaying the sub-form survey.
9. Click the  (**Done**) button to close the sub-form survey window.

View/Accept CLI Part - II

[View/Accept CLI Part - II Online Training Video](#)

To view submitted surveys, select a sub-recipient and reporting period, click the "View Surveys" button, and then click the "View" button next to the survey you wish to view. To accept submitted surveys, click the "Open the CLI Part II Acceptance Panel" link. Please review the information before accepting since the sub-recipient will be unable to edit any information after accepting.



The screenshot displays the 'View/Accept CLI Part - II' interface. At the top, there are dropdown menus for 'Sub-recipient:' (set to 'Substance Abuse Coalition') and 'Reporting Period:' (set to '10/1/2009 - 3/31/2010 - Submitted'). Below these are buttons for 'View Surveys', 'Sub-Form Surveys', and 'Demographic Surveys'. The 'View Surveys' button is highlighted with an orange box and labeled 'View Surveys button'. The 'Sub-Form Surveys' tab is selected, and its button is also highlighted with an orange box and labeled 'Sub-Form Surveys button'. Below the tabs, a list of surveys is shown with columns for survey name, status, and date. Each survey entry has a 'View' button to its right. A callout box labeled 'View buttons' points to these buttons. At the bottom, there is a button labeled 'Open the CLI Part II Acceptance Panel'.

Survey Name	Status	Date	Action
1. All Stars - Active			
1.1 All Stars - SubForm	Complete	3/17/2011 10:19:55 AM	View
2. Guiding Good Choices			
2.1 Guiding Good Choices - Active			
2.1.1 Guiding Good Choices - SubForm	Complete	3/17/2011 10:20:39 AM	View
3. Communities Mobilizing for Change on Alcohol			
3.1 Responsible Beverage Server Training - Active			
3.1.1 Responsible Beverage Server Training - SubForm	Complete	3/9/2011 3:32:06 PM	View
3.2 College Collaboration Team - Active			
3.2.1 College Collaboration Team - SubForm	Complete	3/17/2011 10:22:33 AM	View
3.3 Social Marketing Campaign - Active			
3.3.1 Social Marketing Campaign - SubForm	Complete	3/17/2011 10:23:18 AM	View
3.4 Shoulder-tap enforcement - Active			

Sample screenshot displaying the View/Accept CLI Part II Listing Page with Sub-Form Surveys selected

Tips

- You will need to turn off your pop-up blocker in order to open the sub-form survey.

Viewing a Submitted CLI Part II Demographic Survey

1. Click **Evaluation** from the Menu.
2. Click **View/Accept CLI Part - II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the **View Surveys** button.
6. Click the **Demographics Surveys** tab.
7. Click the **View** button to the right of the demographic survey you wish to view.
8. A new window will open displaying the demographic survey.
9. Click the **Done** button to close the demographic survey window.

View/Accept CLI Part - II

To view submitted surveys, select a sub-recipient and reporting period, click the "View Surveys" button, and then click the "View" button next to the survey you wish to view. To accept submitted surveys, click the "Open the CLI Part II Acceptance Panel" link. Please review the information before accepting since the sub-recipient will be unable to edit any information after accepting.

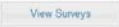

The screenshot displays the 'View/Accept CLI Part - II' interface. At the top, there are dropdown menus for 'Sub-recipient' (set to 'Substance Abuse Coalition') and 'Reporting Period' (set to '10/1/2009 - 3/31/2010 - Submitted'). Below these is a 'View Surveys' button, which is highlighted with an orange box and labeled 'View Surveys button'. Underneath, there are two tabs: 'Sub-Form Surveys' and 'Demographic Surveys'. The 'Demographic Surveys' tab is selected, and its content is highlighted with an orange box and labeled 'Demographic Surveys button'. The content shows a list of surveys under the heading 'Demographic Surveys'. The list includes sections like '1. All Stars', '2. Guiding Good Choices', and '3. Communities Mobilizing for Change on Alcohol'. Each section contains sub-items with details like 'Active', 'Complete', and dates. To the right of each survey entry is a 'View' button, which is highlighted with an orange box and labeled 'View buttons'. At the bottom of the interface, there is a button labeled 'Open the CLI Part II Acceptance Panel'.

Sample screenshot displaying the View/Accept CLI Part II Listing Page with Demographic Surveys selected


Tips

- You will need to turn off your pop-up blocker in order to open the sub-form survey.

Accepting a Submitted CLI Part II

1. Click **Evaluation** from the Menu.
2. Click **View/Accept CLI Part - II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the  (**View Surveys**) button.
6. Click the  (**Open the CLI Part II Acceptance Panel**) button.

***Note:** Only a user with a role of "Project Director" will have access to the **Open the CLI Part II Acceptance Panel** button.



MRT

Management Reporting Tool

Heather S SPF

[Home](#)
[Assessment](#)
[Capacity](#)
[Planning](#)
[Implementation](#)
[Evaluation](#)
[Administration](#)

[Home](#)
[Evaluation](#)
[View/Accept CLI Part - II](#)

[View/Accept CLI Part - II Online Training Video](#)

View/Accept CLI Part - II

To view submitted surveys, select a sub-recipient and reporting period, click the "View Surveys" button, and then click the "View" button next to the survey you wish to view. To accept submitted surveys, click the "Open the CLI Part II Acceptance Panel" link. Please review the information before accepting since the sub-recipient will be unable to edit any information after accepting.

Sub-recipient:

Substance Abuse Coalition

Reporting Period:

10/1/2009 - 3/31/2010 - Submitted

View Surveys

View Surveys button

Sub-Form Surveys

Demographic Surveys

Sub-Form Surveys

1. All Stars

1.1 All Stars - Active

1.1.1 All Stars - SubForm Complete 3/17/2011 10:19:55 AM

View

2. Guiding Good Choices

2.1 Guiding Good Choices - Active

2.1.1 Guiding Good Choices - SubForm Complete 3/17/2011 10:20:39 AM

View

3. Communities Mobilizing for Change on Alcohol

3.1 Responsible Beverage Server Training - Active

3.1.1 Responsible Beverage Server Training - SubForm Complete 3/9/2011 3:32:06 PM

View

3.2 College Collaboration Team - Active

3.2.1 College Collaboration Team - SubForm Complete 3/17/2011 10:22:33 AM

View

3.3 Social Marketing Campaign - Active

3.3.1 Social Marketing Campaign - SubForm Complete 3/17/2011 10:22:33 AM



View


3.4 Shoulder-tap enforcement - Active

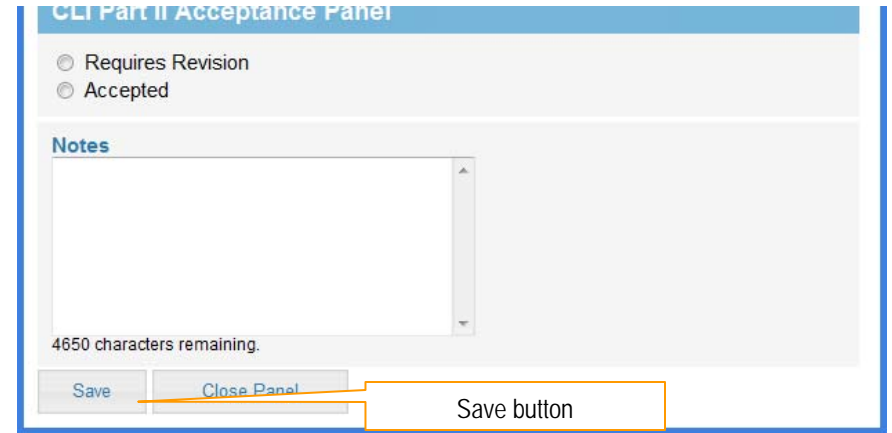
Open the CLI Part II Acceptance Panel

Open the CLI Part II Acceptance Panel link

Sample screenshot displaying the View/Accept CLI Part II Listing Page


7. Using the radio buttons, select the acceptance status.
8. If desired, enter any notes needed for the Sub-recipient community in the **Notes** field.
9. Click the  (**Save**) button.
*Note: Click the  (**Close Panel**) button to cancel the acceptance.

*Note: Once the  (**Save**) button is selected, an email will be sent to the Grantee as well as the Sub-recipient community.



Screenshot displaying the CLI Part II Acceptance Panel

Tips

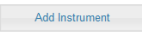
- If there is no reporting period within the Reporting Period dropdown list, it means the Sub-recipient community has not submitted their CLI Part II yet.
- Once a CLI Part II is accepted, the  (**Open the CLI Part II Acceptance Panel**) button will no longer be available for the accepted reporting period.

Participant Level Instrument (PLI)

The Participant Level Instrument (PLI) module allows the user to identify the instruments given to participants, identify the participants responding to the survey instruments, and enter the PLI data responses from the individual participants. The PLI Is due every six (6) months.

Identify Instrument

The Identify Instrument module allows the user to identify the instrument used with an implemented strategy name/type from CLI Part I.

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Instrument** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. Click the  (**Add Instrument**) button.

MRT
Management Reporting Tool

Justin F SPF

[Home](#) [Assessment](#) [Capacity](#) [Planning](#) [Implementation](#) [Evaluation](#) [Administration](#)

[Home](#) [Evaluation](#) [Identify Instrument](#)

Identify Instrument

To get started, first choose the instrument you are using under Identify Instrument. Once the instrument has been saved, add the participants who will be responding to the instrument under Identify Participants. Finally, enter the instrument responses under Enter My PLI Data. Grantee Evaluators may upload data under Upload My PLI Data.

Add Instrument button

Sub-recipient:

Substance Abuse Coalition

Add Instrument

Return to PLI Menu




Instrument Name	Strategy Name/Type	Survey Type
Standard Youth PLI	Guiding Good Choices-Prevention Education	Youth PLI
Custom Youth	Responsible Beverage Server Training-Environmental Strategies	Youth PLI

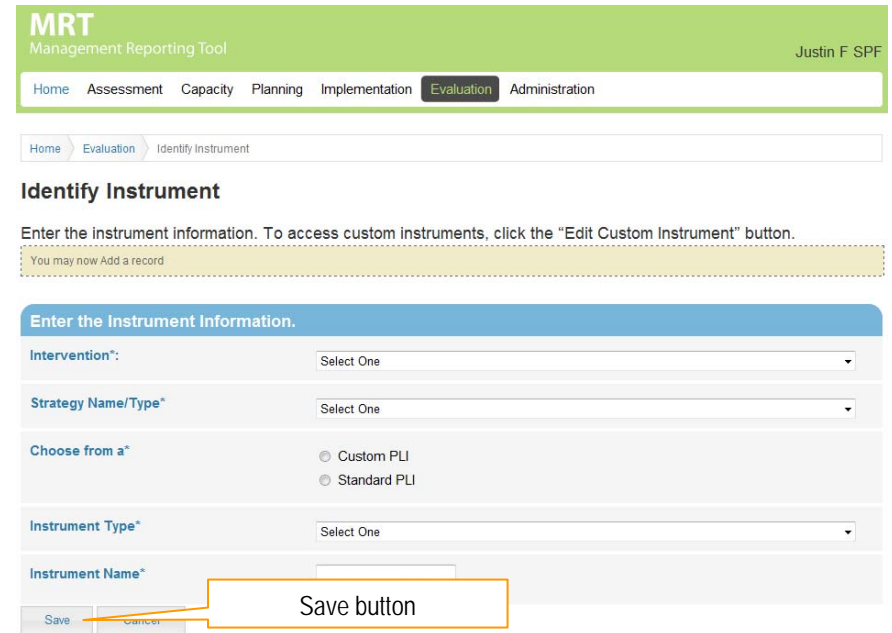
Sample screenshot displaying the Identify Instrument Listing Page

SPF SIG Instruments User Manual

62

© KIT Solutions® 2012

6. Select the intervention name from the **Intervention*** dropdown menu.
 *Note: The Intervention list is populated from the interventions that were entered in the [Q163: Manage Implemented Interventions](#) section.
7. Select the strategy name from the **Strategy Name/Type*** dropdown menu.
 *Note: The Strategy Name list is populated from the strategies that were entered in the [Q163: Manage Implemented Interventions](#) section.
8. Select whether the survey instrument will be a Custom PLI survey or the Standard PLI survey using the **Choose from a*** radio buttons.
 *Note: If Custom PLI is selected, see the [Edit Custom Instrument](#) section for additional instructions.
9. Select the type of survey instrument from the **Instrument Type*** dropdown menu.
10. If you selected that the survey instrument was a Custom PLI, enter a name for the survey instrument in the **Instrument Name*** text box.
 *Note: If you selected that the survey instrument was a Standard PLI, the **Instrument Name** will be filled in for you with the Instrument Type name.
11. Click the  **(Save)** button.
 *Note: Click the  **(Cancel)** button to cancel this entry.
12. From the Identify Instrument Listing Page, click the  **(Return to PLI Menu)** button.







Screenshot displaying the Identify Instrument Edit Form

Tips

- There are four (4) unique surveys that can be entered/saved for a strategy name/type: Standard Adult, Standard Youth, Custom Adult, or Custom Youth. You will not be able to enter more than four (4) surveys per strategy name/type.
- The Standard version of the survey contains all of the questions available for that instrument. The Customized survey allows the user to select a particular set of those questions. For example, if the survey the participants completed only included the questions related to Alcohol then the data entry person could Customize the survey to include only the Alcohol questions and remove all of the 30 day use marijuana, tobacco, other drugs, etc questions. This is a good time saver for the data entry person because it allows the online version to look the same as the paper version the participant completed. (Note: All Demographics questions must be included on all surveys; even customized ones.)

Edit Custom Instrument

The Edit Custom Instrument button provides the ability to remove and reorder questions on the Standard survey.

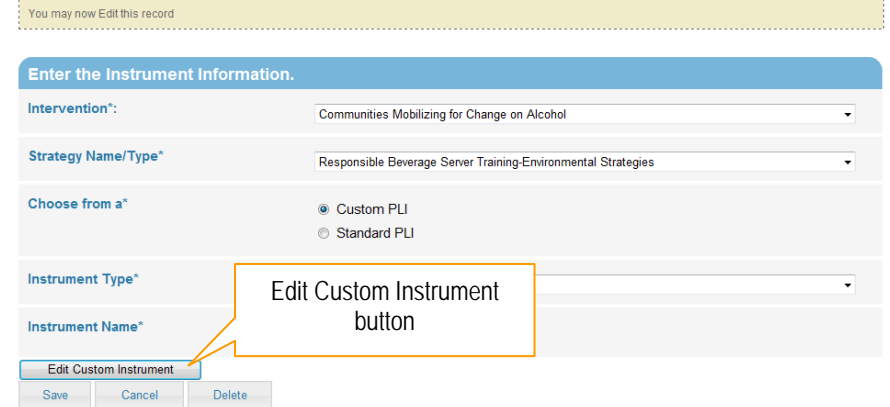
1. From the Identify Instrument Listing Page, select the survey instrument you wish to edit a custom instrument for by clicking the appropriate Instrument Name.
2. Click the  (**Edit Custom Instrument**) button.
**Note:* This button will only be available when the Instrument Name is in edit mode.
3. A new window will open displaying the Standard survey.
4. To exclude a question from the survey, uncheck the checkbox to the right of the appropriate question from the Include column.
**Note:* The first several fields are required for every survey and cannot be removed from the survey. The Include column shows the checkboxes "grayed" out so they cannot be removed.
 - a. To include a question into the survey, ensure the checkbox from the Include column is checked.
5. To reorder the questions, enter the appropriate number in the text box to the right of the appropriate question from the Order column.
6. Click the  (**Preview**) button to update the survey.
**Note:* The excluded questions will appear at the bottom of the survey. You may still include the questions if need be.
7. Click the  (**Save**) button.
Note:* Click the  (Cancel**) button to cancel this entry.

Tips

- You will need to turn off your pop-up blocker in order to open the Customize Survey.

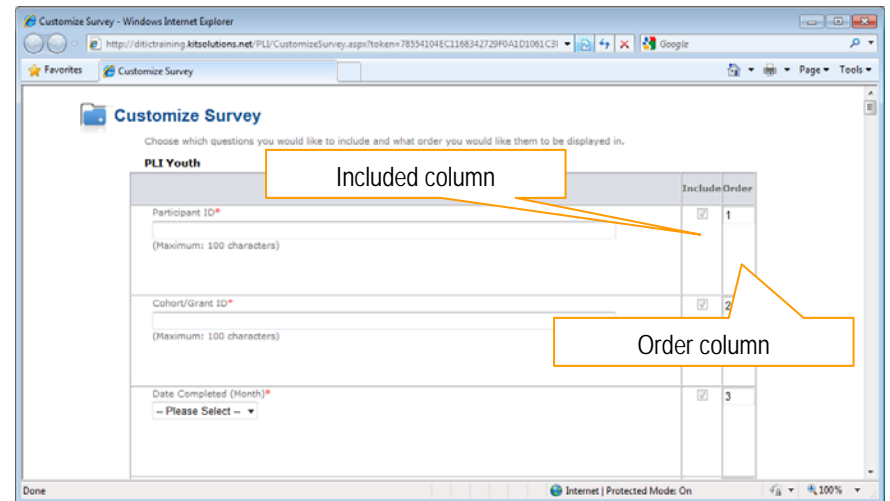
Identify Instrument

Enter the instrument information. To access custom instruments, click the "Edit Custom Instrument" button.



The screenshot shows the 'Identify Instrument' form. At the top, a yellow banner states 'You may now Edit this record'. Below this is a blue header 'Enter the Instrument Information.'. The form contains several fields: 'Intervention*' with a dropdown menu showing 'Communities Mobilizing for Change on Alcohol'; 'Strategy Name/Type*' with a dropdown menu showing 'Responsible Beverage Server Training-Environmental Strategies'; 'Choose from a*' with radio buttons for 'Custom PLI' (selected) and 'Standard PLI'; 'Instrument Type*' with a dropdown menu; and 'Instrument Name*' with a text input field. At the bottom, there are three buttons: 'Edit Custom Instrument' (highlighted with an orange box and labeled 'Edit Custom Instrument button'), 'Save', 'Cancel', and 'Delete'.



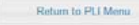
Sample screenshot displaying the Identify Instrument Edit Form

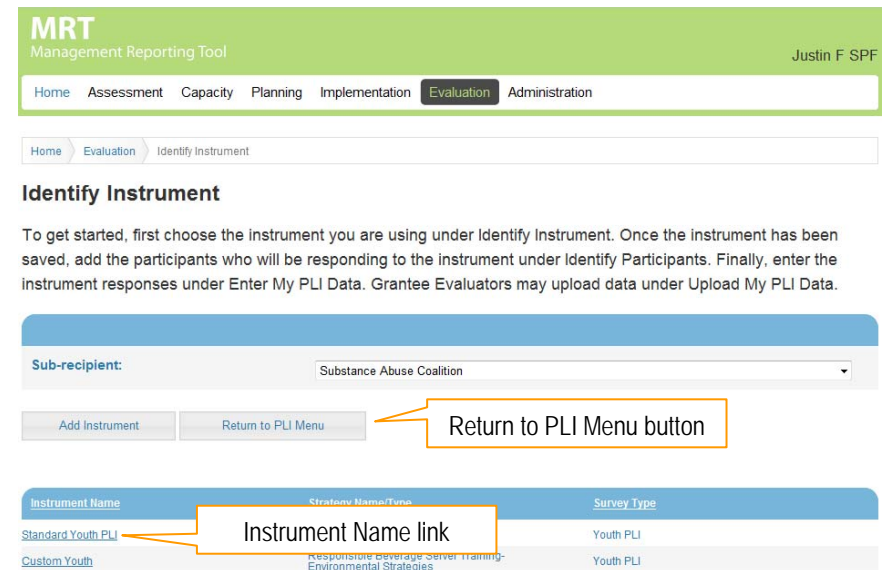


The screenshot shows the 'Customize Survey' form in a web browser. The title is 'Customize Survey - Windows Internet Explorer'. The URL is 'http://ditctraining.kitsolutions.net/PLI/CustomizeSurvey.aspx?token=78354104EC1168342729F0A1D1061C31'. The form has a header 'Customize Survey' and a sub-header 'Choose which questions you would like to include and what order you would like them to be displayed in.'. Below this is a table with columns 'Include' and 'Order'. The table has three rows of questions: 'Participant ID*' (Maximum: 100 characters), 'Cohort/Grant ID*' (Maximum: 100 characters), and 'Date Completed (Month)*' (Please Select --). The 'Include' column has checkboxes, and the 'Order' column has text boxes. An orange box highlights the 'Include' column with the label 'Included column'. Another orange box highlights the 'Order' column with the label 'Order column'.

Sample screenshot displaying the Customize Survey Edit Form

Editing an Instrument

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Instrument** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. From the Indentify Instrument Listing Page, select the survey instrument you wish to edit by clicking the appropriate Instrument Name.
6. Make any changes needed to the form.
7. Click the  **(Save)** button.
*Note: Click the  **(Cancel)** button to cancel this entry.
8. From the Identify Instrument Listing Page, click the  **(Return to PLI Menu)** button.



MRT
Management Reporting Tool

Justin F SPF

Home Assessment Capacity Planning Implementation **Evaluation** Administration

Home Evaluation Identify Instrument

Identify Instrument

To get started, first choose the instrument you are using under Identify Instrument. Once the instrument has been saved, add the participants who will be responding to the instrument under Identify Participants. Finally, enter the instrument responses under Enter My PLI Data. Grantee Evaluators may upload data under Upload My PLI Data.

Sub-recipient: Substance Abuse Coalition

Add Instrument Return to PLI Menu




Return to PLI Menu button

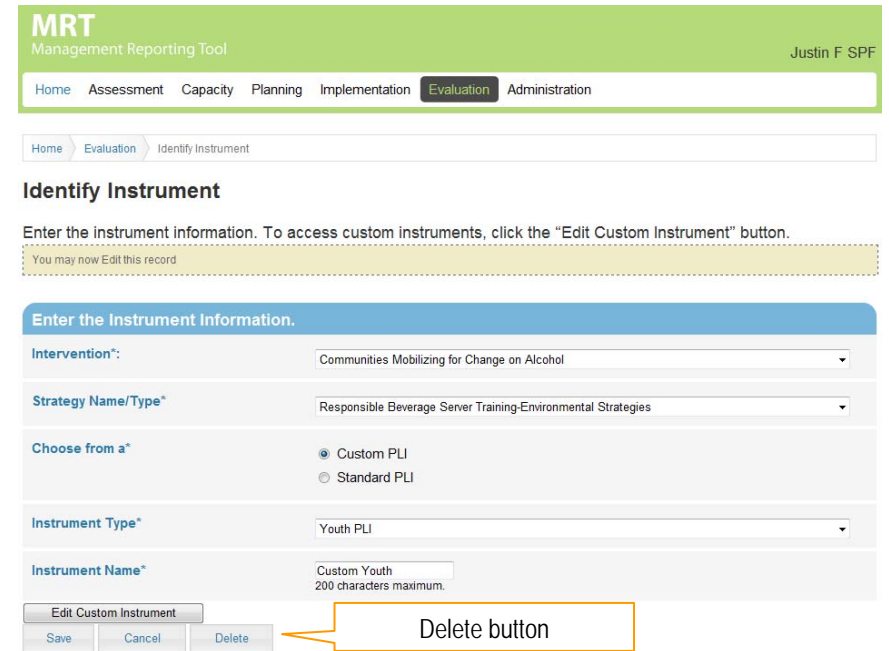
Instrument Name	Strategy Name/Topic	Survey Type
Standard Youth PLI		Youth PLI
Custom Youth	Responsive coverage server training-Environmental Strategies	Youth PLI

Instrument Name link

Sample screenshot displaying the Identify Instrument Listing Page

Deleting an Instrument

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Instrument** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. From the Identify Instrument Listing Page, select the survey instrument you wish to delete by clicking the appropriate Instrument Name.
6. Click the  (**Delete**) button.
*Note: Click the  (**Cancel**) button to cancel this entry.
7. The record will be removed from the grid.
8. From the Identify Instrument Listing Page, click the  (**Return to PLI Menu**) button.







Sample screenshot displaying the Identify Instrument Edit Form

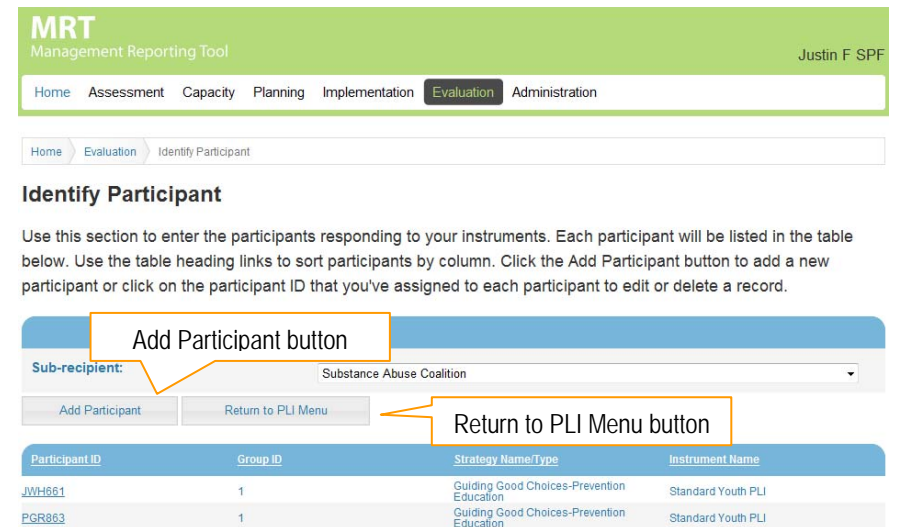
Tips

- Once participant responses are associated with a survey instrument, the instrument information cannot be modified or deleted.

Identify Participant

The Identify Participant module allows the user to identify the participants who are responding to the PLI.

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Participant** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. Click the  (**Add Participant**) button.
6. Enter the participant identification in the **Participant ID*** text box.
7. Enter the group identification in the **Group ID*** text box.
**Note:* The Group ID is a required field and is defaulted to 1 because not all Grantees/Sub-recipients will use group identification.
8. Select the intervention from the **Intervention*** dropdown menu.
**Note:* The Strategy Name list is populated from the strategies that were entered in the [Q163: Manage Implemented Interventions](#) section.
9. Select the strategy name from the **Strategy Name/Type*** dropdown menu.
**Note:* The Strategy Name list is populated from the strategies that were entered in the [Q163: Manage Implemented Interventions](#) section.
10. Select the survey instrument from the **Instrument Name*** dropdown menu.
**Note:* If there are no instruments in the dropdown menu, no instruments have been associated with the Strategy Name yet. This can be done using the [Identify Instrument](#) form.
11. Click the  (**Save**) button.
Note:* Click the  (Cancel**) button to cancel this entry.
12. From the Identify Participant Listing Page, click the  (**Return to PLI Menu**) button.



MRT
Management Reporting Tool
Justin F SPF

Home Assessment Capacity Planning Implementation **Evaluation** Administration

Home Evaluation Identify Participant

Identify Participant

Use this section to enter the participants responding to your instruments. Each participant will be listed in the table below. Use the table heading links to sort participants by column. Click the Add Participant button to add a new participant or click on the participant ID that you've assigned to each participant to edit or delete a record.

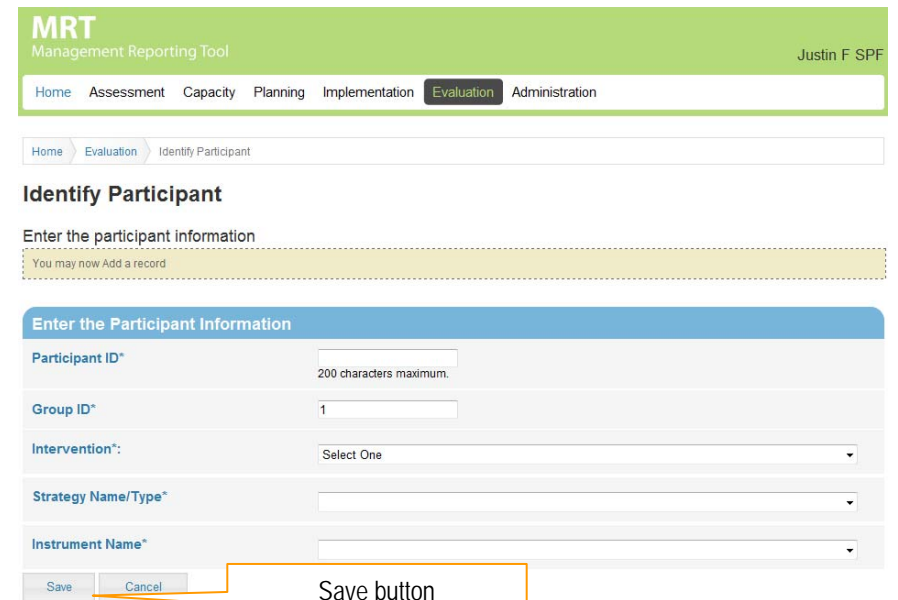
Add Participant button

Sub-recipient: Substance Abuse Coalition

Return to PLI Menu button

Participant ID	Group ID	Strategy Name/Type	Instrument Name
JH4561	1	Guiding Good Choices-Prevention Education	Standard Youth PLI
PGR863	1	Guiding Good Choices-Prevention Education	Standard Youth PLI

Sample screenshot displaying the Identify Participant Listing Page



MRT
Management Reporting Tool
Justin F SPF

Home Assessment Capacity Planning Implementation **Evaluation** Administration

Home Evaluation Identify Participant

Identify Participant

Enter the participant information

You may now Add a record

Enter the Participant Information

Participant ID* 200 characters maximum.

Group ID* 1

Intervention*: Select One



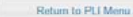
Strategy Name/Type*

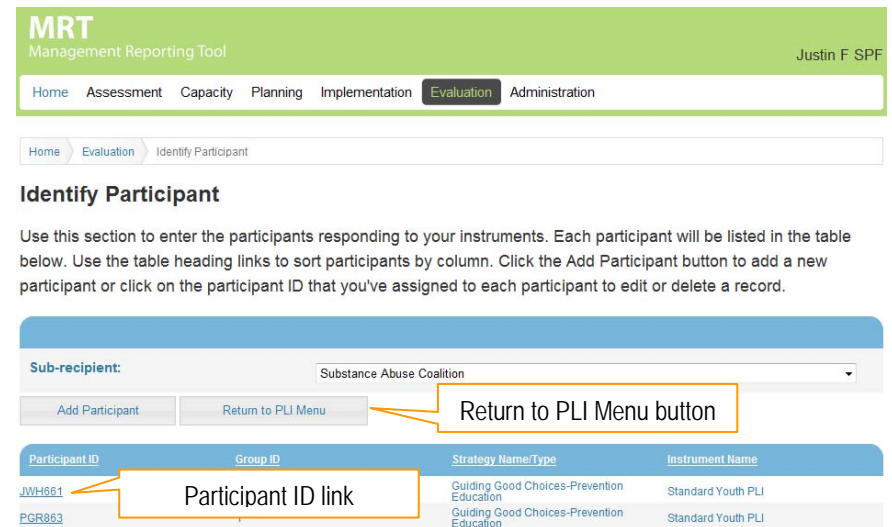
Instrument Name*

Save button

Sample screenshot displaying the Identify Participant Edit Form

Editing a Participant

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Participant** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. From the Indentify Instrument Listing Page, select the participant you wish to edit by clicking the appropriate Participant ID.
6. Make any changes needed to the form.
7. Click the  **(Save)** button.
*Note: Click the  **(Cancel)** button to cancel this entry.
8. From the Identify Participant Listing Page, click the  **(Return to PLI Menu)** button.



MRT
Management Reporting Tool

Justin F SPF

Home Assessment Capacity Planning Implementation **Evaluation** Administration

Home Evaluation Identify Participant

Identify Participant

Use this section to enter the participants responding to your instruments. Each participant will be listed in the table below. Use the table heading links to sort participants by column. Click the Add Participant button to add a new participant or click on the participant ID that you've assigned to each participant to edit or delete a record.




Sub-recipient: Substance Abuse Coalition

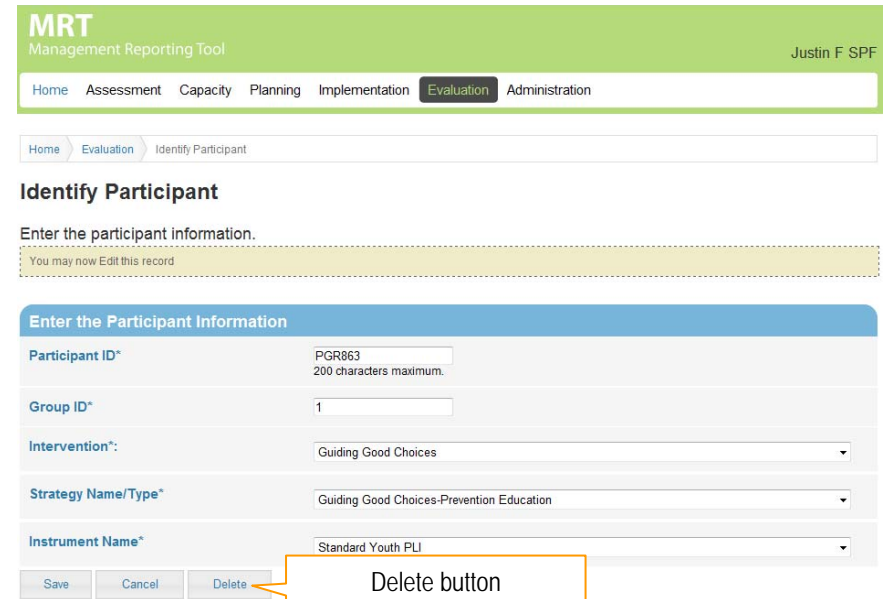
Add Participant Return to PLI Menu

Participant ID	Group ID	Strategy Name/Type	Instrument Name
JWH861		Guiding Good Choices-Prevention Education	Standard Youth PLI
PGR863		Guiding Good Choices-Prevention Education	Standard Youth PLI

Sample screenshot displaying the Identify Participant Listing Page

Deleting a Participant

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Participant** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. From the Indentify Instrument Listing Page, select the participant you wish to delete by clicking the appropriate Participant ID.
6. Click the  (**Delete**) button.
*Note: Click the  (**Cancel**) button to cancel this entry.
7. The record will be removed from the grid.
8. From the Identify Participant Listing Page, click the  (**Return to PLI Menu**) button.



The screenshot displays the MRT Management Reporting Tool interface. At the top, there is a green header bar with the text 'MRT Management Reporting Tool' and the user name 'Justin F SPF'. Below the header is a navigation bar with tabs for 'Home', 'Assessment', 'Capacity', 'Planning', 'Implementation', 'Evaluation' (which is highlighted), and 'Administration'. The main content area shows a breadcrumb trail: 'Home > Evaluation > Identify Participant'. The title 'Identify Participant' is followed by the instruction 'Enter the participant information.' and a note 'You may now Edit this record'. Below this is a form titled 'Enter the Participant Information' with the following fields: 'Participant ID*' (text input with value 'PGR863' and a note '200 characters maximum.'), 'Group ID*' (text input with value '1'), 'Intervention*' (dropdown menu with 'Guiding Good Choices' selected), 'Strategy Name/Type*' (dropdown menu with 'Guiding Good Choices-Prevention Education' selected), and 'Instrument Name*' (dropdown menu with 'Standard Youth PLI' selected). At the bottom of the form are three buttons: 'Save', 'Cancel', and 'Delete'. The 'Delete' button is highlighted with an orange box and labeled 'Delete button'.

Sample screenshot displaying the Identify Participant Edit Form

Tips

- Once participant responses are associated with a survey instrument, the participant details cannot be modified or deleted.

Enter My PLI Data

The Enter My PLI Data module allows the user to record the survey instrument PLI data responses from the individual participants.

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Enter My PLI Data** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. Select the intervention from the **Intervention*** dropdown menu.
6. Select the strategy name from the **Strategy Name/Type** dropdown menu.
7. Select the survey instrument from the **Instrument Name** dropdown menu.
8. A grid displaying the individual participants associated with the strategy and instrument will display. Click a survey link to the right of the appropriate Participant ID.
9. A new window will open displaying the PLI survey.

MRT
Management Reporting Tool
Justin F SPF

Home Assessment Capacity Planning Implementation **Evaluation** Administration

Home Evaluation Enter My PLI Data

Enter My PLI Data

Use this section to enter participant level instruments for the previously identified participants. First select a Sub-recipient, Intervention, Strategy Name/Type and Instrument from the drop down menu. To enter or edit a PLI response, click the appropriate instrument link.

Note: Pop-up blockers must be disabled in order to view surveys.

Sub-recipient: Substance Abuse Coalition

Intervention: Guiding Good Choices

Strategy Name/Type: Guiding Good Choices-Prevention Education

Instrument Name: Standard Youth PLI

Update Survey Status Return to PLI Menu

Participant ID	Group ID	Baseline	Exit	Follow-Up 1	Follow-Up 2
JWH661	1	Baseline(Complete)	Exit(Incomplete)	Follow-Up 1(Incomplete)	Follow-Up 2(Incomplete)
PGR863	1	Baseline(Incomplete)	Exit(Incomplete)	Follow-Up 1(Incomplete)	Follow-Up 2(Incomplete)

Sample screenshot displaying the Enter My PLI Data Listing Page

Tips

- The system does not force the data entry person to enter the PLI data in order of Baseline to Exit to Follow-up. This is this way for 2 reasons: (1) There is a chance that the data entry might have the stack of Exit PLIs in front of them and so they can enter the Exit ones first and then later add the Baselines. And (2) A participant may have been present for the Exit but not for the Baseline administration; the Exit PLI for that participant can still be entered into the system. – The system is flexible since it is the data entry person completing the information rather than the participant.

10. Answer each question by filling in the appropriate radio button, check boxes, or text field.
11. Once you have answered all the questions, click the **Done** (Done) button.
*Note: The final page is to be completed by the Project Director.
12. Click the **Close** (Close) button to close the window.
13. Click the **Update Survey Status** (Update Survey Status) button to display the status of the report (i.e., the report display will go from Incomplete status to Complete status).
14. From the Enter My PLI Data Listing Page, click the **Return to PLI Menu** (Return to PLI Menu) button.

*Note: The Progress Bar at the top of each page shows how much of the survey has been completed.


Sample screenshot displaying the PLI Youth Survey

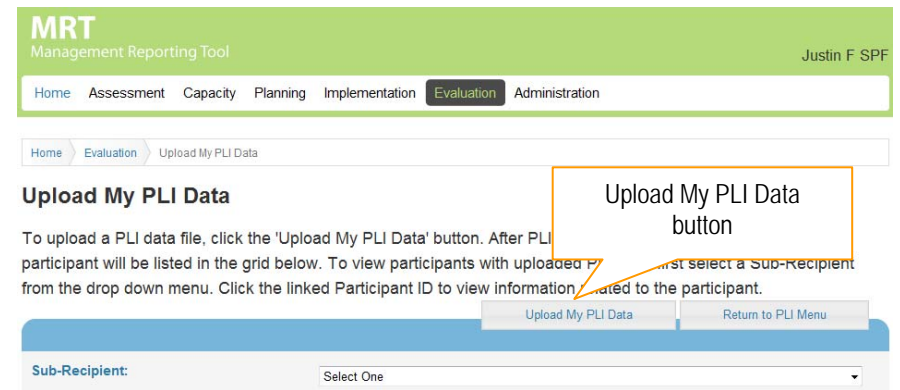
Tips

- You will need to turn off your pop-up blocker in order to open the survey.
- If you made a mistake and entered a survey incorrectly, click the **Delete Responses** (Delete Responses) button. This button is available for completed survey instruments only.
- The Left Blank and Bad Data options within the survey exist only in the online version. They are responses only the data entry person has and are not options on the paper instrument that the participant completes.
 - If the participant did not provide a response to a particular question the data entry person can still provide a response – by selecting Left Blank. *(This is needed because the questions are required and a response must be selected even if the participant did not provide a response).*
 - If the participant, for example, selected two of the response options rather than just one the data entry person can select "Bad Data".

Upload My PLI Data

The Upload My PLI Data module allows the user to upload PLI responses using the upload tool. Only the Grantee Evaluator has access to the Upload My PLI Data module.

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Upload My PLI Data** from the Participant Level Instrument (PLI) Landing Page.
4. Click the  (Upload My PLI Data) button.
5. Select the Sub-recipient community name from the **Sub-Recipient*** dropdown menu.
6. Select the intervention name from the **Intervention Name*** dropdown menu.
7. Select the strategy name from the **Strategy Name/Type*** dropdown menu.
8. Select the survey instrument from the **Instrument Name*** dropdown menu.
9. Select the instrument type from the **Time Point*** dropdown menu.
10. Links to the survey instrument templates and codebooks are available. Use the templates and codebooks to create your upload file.



Screenshot displaying the Upload My PLI Data Listing Page

Upload My PLI Data

Complete the online form below by first selecting Sub-Recipient, Intervention, Strategy Name/Type, Instrument Name, and Time Point. Next, select the file you want to upload. When you have completed the online form, click the 'Submit' button at the bottom of the page to submit your file.

Note: You may only upload the following file types: Excel, CSV(comma delimited) or XML

Sample screenshot displaying the Upload My PLI Data Edit Form

11. Using the radio buttons, select the upload file type.
12. To upload a file, perform the following steps:
 - a. Click the **Browse...** (**Browse**) button.
 - b. Select the document you wish to upload from the **Choose File** window and click the **Open** (**Open**) button.
 - c. The file path will appear in the **Choose the file you would like to upload:*** text box.
 - i. If Excel 97-2003(.xls) or Excel 07-2010 is selected as the file format, a new field will appear: **Excel Sheet Name**. Enter the sheet name in the text box.

**Note:* The excel sheet refers to the tabs located at the bottom of an excel spreadsheet. This field is defaulted to say Sheet1.
13. Click the **Submit** (**Submit**) button.

Note:* Click the **Cancel (**Cancel**) button to cancel this entry.

Choose the file you would like to upload:*

☐ CSV

☒ Excel 97-2003(.xls)

☐ XML

☐ Excel 07-2010(.xlsx)

Browse...

Excel Sheet Name: Sheet1


Comments

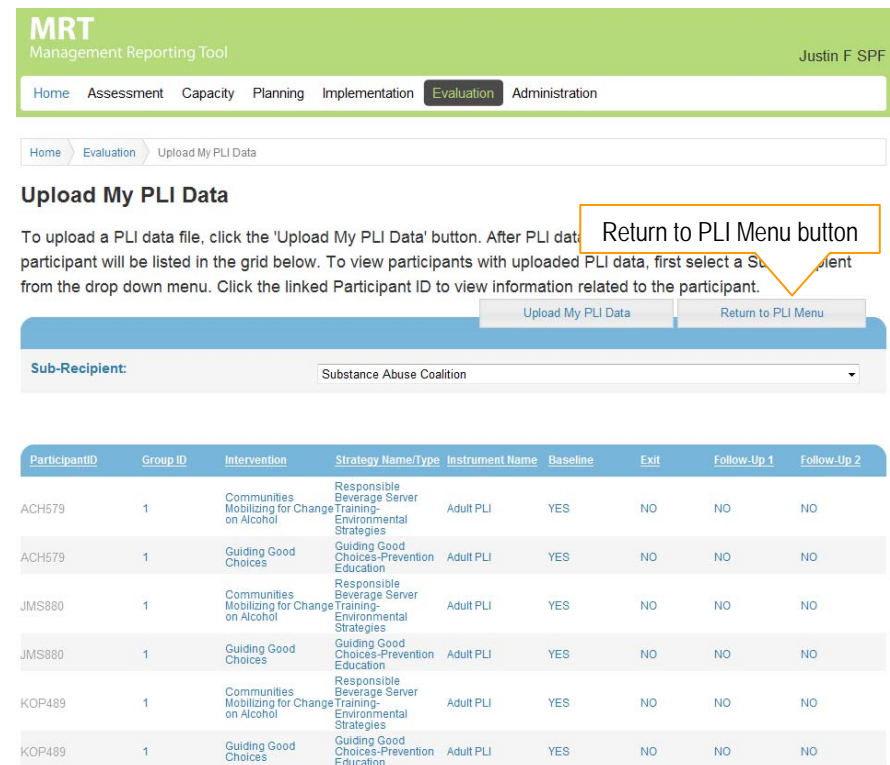
Comments:

1000 characters maximum.

Submit Cancel

Sample screenshot displaying the Upload My PLI Data Edit Form with Excel 97-2003(.xls) selected – this is a partial screenshot

14. Once an upload file is submitted, a grid will appear displaying the records that were uploaded. To view a list of records, select the Sub-Recipient community from the **Sub-Recipient** dropdown list.
15. From the Upload My PLI Data Listing Page, click the  (Return to PLI Menu) button.



MRT
Management Reporting Tool

Justin F SPF

Home Assessment Capacity Planning Implementation **Evaluation** Administration

Home Evaluation Upload My PLI Data

Upload My PLI Data

To upload a PLI data file, click the 'Upload My PLI Data' button. After PLI data is uploaded, a participant will be listed in the grid below. To view participants with uploaded PLI data, first select a Sub-Recipient from the drop down menu. Click the linked Participant ID to view information related to the participant.

[Upload My PLI Data](#) [Return to PLI Menu](#)

Sub-Recipient: Substance Abuse Coalition

ParticipantID	Group ID	Intervention	Strategy Name/Type	Instrument Name	Baseline	Exit	Follow-Up 1	Follow-Up 2
ACH579	1	Communities Mobilizing for Change on Alcohol	Responsible Beverage Server Training-Environmental Strategies	Adult PLI	YES	NO	NO	NO
ACH579	1	Guiding Good Choices	Guiding Good Choices-Prevention Education	Adult PLI	YES	NO	NO	NO
JMS880	1	Communities Mobilizing for Change on Alcohol	Responsible Beverage Server Training-Environmental Strategies	Adult PLI	YES	NO	NO	NO
JMS880	1	Guiding Good Choices	Guiding Good Choices-Prevention Education	Adult PLI	YES	NO	NO	NO
KOP489	1	Communities Mobilizing for Change on Alcohol	Responsible Beverage Server Training-Environmental Strategies	Adult PLI	YES	NO	NO	NO
KOP489	1	Guiding Good Choices	Guiding Good Choices-Prevention Education	Adult PLI	YES	NO	NO	NO

Sample screenshot displaying the Upload My PLI Data Edit Form


Tips

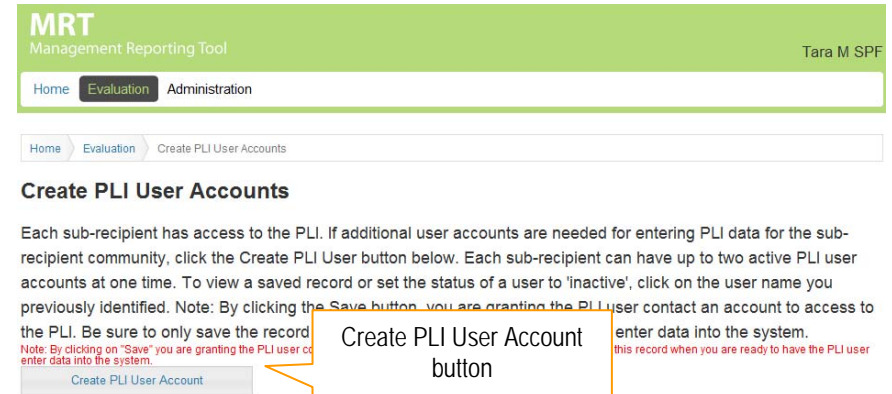
- You will not be able to modify an uploaded file.
- If something in the upload file does not match a variable or value in the Codebook then the user receives an "Oops!" message and also an Error Report. The Error Report opens in a new window which the Grantee Evaluator can print/save and then use to correct the file and make it match the Codebook. Once all corrections are made the Grantee Evaluator can then upload the file.

Create PLI User Accounts

Each Sub-recipient has access to the PLI. The Create PLI User Accounts module allows the Sub-recipient community to add additional user accounts if additional members are needed to enter PLI data for the Sub-recipient community. Each Sub-recipient community can have up to two (2) active PLI user accounts at one (1) time.

Adding a PLI User Account

1. Click **Evaluation** from the Menu.
2. Click **Create PLI User Accounts** from the Evaluation Landing Page.
3. Click the  (Create PLI User Account) button.



Screenshot displaying the Create PLI User Accounts Listing Page

4. Enter the user's first name in the **First Name*** text box.
 5. Enter the user's last name in the **Last Name*** text box.
 6. Enter the user's telephone number in the **Telephone Number*** text box.
 7. Enter the user's email address in the **Email address*** text box.
 8. Select the status of the user using the **Status*** radio buttons.
 - a. Active: currently entering PLI data
 - b. Inactive: no longer entering PLI data
 9. Click the (**Save**) button.
- *Note: Click the (**Cancel**) button to cancel this entry.

MRT
Management Reporting Tool

Home Evaluation Administration

Home Evaluation Create PLI User Accounts

Create PLI User Accounts

Enter PLI user information. Upon saving, a PLI user account will be created for the contact information provided. An email will be sent using the email address provided below with the login info for accessing the PLI. PLI users will be unable to access the PLI until this record is saved. If the user is no longer active with your subrecipient community, set the status of the user to 'inactive'.

You may now Add a record

Note: By clicking on "Save" you are granting the PLI user contact an account to access to the PLI. Be sure to only "Save" this record when you are ready to have the PLI user enter data into the system.

PLI User Information	
First Name:*	<input type="text"/> 200 characters maximum.
Last Name:*	<input type="text"/> 200 characters maximum.
Telephone Number:*	<input type="text"/> 20 characters maximum.
Email address:*	<input type="text"/> 50 characters maximum.
Status*	Select One

Save button

Screenshot displaying the Create PLI User Accounts Edit Form

Tips

- Once the Create PLI User Accounts form is saved, an email with login information will be sent to the user.

Editing a PLI User Account

1. Click **Evaluation** from the Menu.
2. Click **Create PLI User Accounts** from the Evaluation Landing Page.
3. From the Listing Page, select the user account you wish to edit by clicking the appropriate User Name.
4. Make any changes needed to the form.
5. Click the (**Save**) button.

*Note: Click the (**Cancel**) button to cancel this entry.



Sample screenshot displaying the Create PLI User Accounts Listing Page

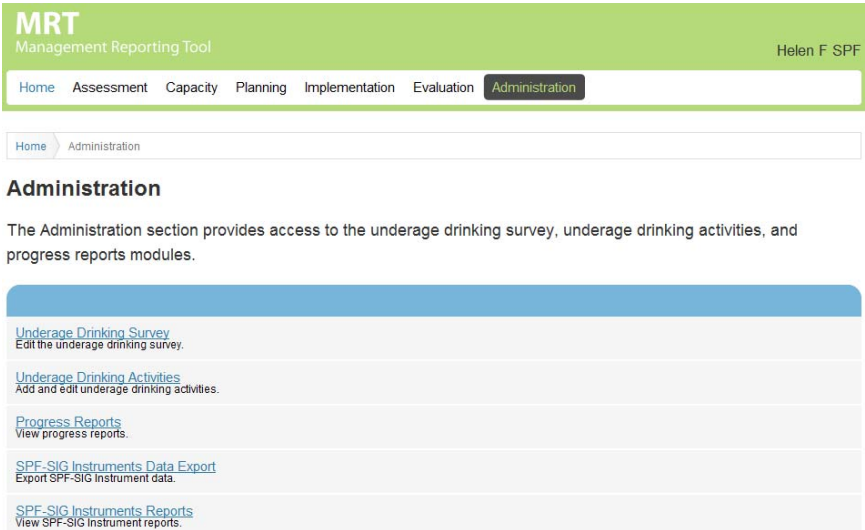
Tips

- The **First Name** and **Last Name** fields may not be modified.
- If a user is no longer entering the PLI data, set the **Status** to Inactive.
- Once a user is set to Inactive **Status**, you will no longer be able to modify the account details.

ADMINISTRATION

Within the Administration module, a user is able to perform the following tasks:

- 1. SPF-SIG Instruments Data Export.
- 2. SPF-SIG Instruments Reports.



Screenshot of the Administration Landing Page

SPF-SIG Instruments Data Export

The SPF-SIG Instruments Data Export module allows the user to export their GLI and sub-recipient CLI data in raw format.

Using the Data Export

1. Select the instrument you would like to view from the **Instrument*** dropdown list.
 - a. If CLI Part I or CLI Part II is selected, new fields will appear.
 - i. Use the checkboxes to select the **CLI Part I Surveys*** you wish to view.
 - ii. Use the checkboxes to select the **Sub-recipient*** you wish to view.
2. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
3. Select the format you wish to export this data into from the **Format*** dropdown menu.
4. Click the **Export** (Export) button.
5. A link to the exported file will appear under **Created Files**. Click the link to open the file.

SPF-SIG Instruments Data Export

To export your SPF-SIG instrument data, choose from the selections below and click the Export button. Links will then be displayed to download the data in CSV format.

Additional documentation can be accessed on the [SPF-SIG Instrument Tools](#) page.

Note: Some data sets exceed the number of columns allowed in Excel 2003 and earlier versions. If Excel 2007 is not available, you will need to save the file and open/import it in another program.

SPF SIG Data Export

Instrument* CLI Part I

CLI Part I Surveys*

- ☐ Check All
- ☒ Administrative (Subrecipient)
- ☐ Needs and Resource Assessment Survey
- ☐ Capacity Building Survey
- ☐ Strategic Plan Development Survey
- ☐ Prevention Intervention Implementation Survey
- ☐ Monitoring and Evaluation Survey
- ☐ Contextual Factors Survey
- ☐
- ☐

Subrecipient*

- ☐ Check All
- ☒ Substance Abuse Coalition
- ☐ No Drugs Coalition
- ☐ Hope & Recovery Coalition
- ☐ South End Healthy Coalition

Reporting Period* Beginning of Grant - 9/30/2009

Format* CSV

Export

Created Files

CLI Part I Roster_03242011_104510_hstephens.csv

CLI Part I Roster_03242011_104510_hstephens.csv

Sample screenshot displaying the SPF-SIG Instruments Data Export

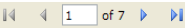
Tips

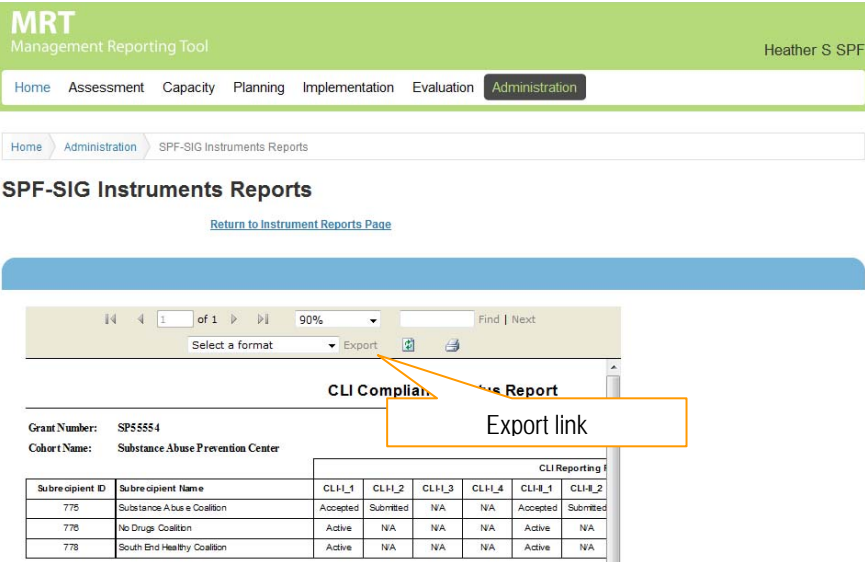
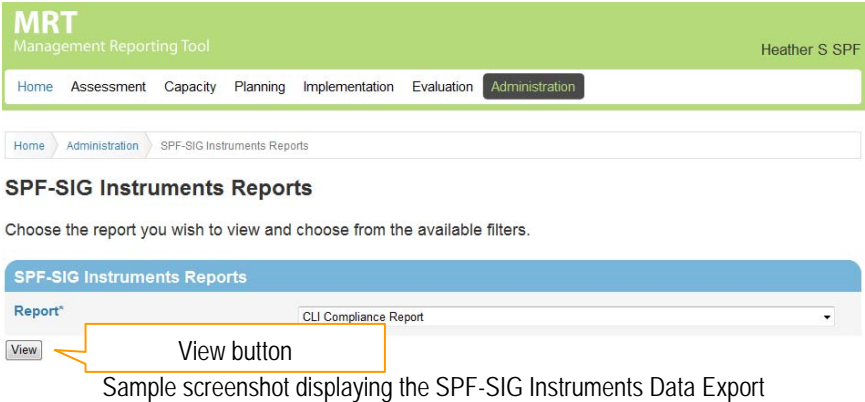
- Some data sets exceed the number of columns allowed in Excel 2003 and earlier versions. If Excel 2007 is not available, you will need to save the file and open/import it in another program.
- Click the [SPF-SIG Instrument Tools](#) (SPF-SIG Instruments Tools) link to access additional documents that will be helpful when using the SPF-SIG Instruments Data Export.

SPF-SIG Instruments Reports

The SPF-SIG Instruments Reports module allows the user to view several SPF-SIG Instrument reports.

Viewing a Report

1. Select report you would like to view from the **Report*** dropdown list.
 - a. Depending on the report selected, new fields may appear.
2. Click the **View** (**View**) button.
3. A new window will open displaying the selected report.
4. Click the  (arrows) to maneuver to other pages in the report.
 - a. To move to a specific page within the report, type a page number into the text box and click the **Enter** button on your keyboard.
5. The dropdown menu can be used to change the level of magnification of the report.
6. To find a specific word or phrase, enter it into the **Find** text box and click the **Find** (**Find**) link.
 - a. Click the **Next** (**Next**) link to be taken to the next instance of the word or phrase.
7. To print or save the report you will have to download the report.
 - a. To download the report, select the type of file you want from the **Select a format** dropdown menu and click the **Export** (**Export**) link.
8. Click the [Return to Instrument Reports Page](#) (**Return to Instrument Reports Page**) link.



Sample screenshot displaying a Progress Report view screen – this is a partial screenshot